IDEXX **Cornerstone***
Practice Management System

Cornerstone 8.1 Basic Foundation Training Guide

IDEXX LABORATORIES

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Lessons are marked to indicate which teams the lessons apply to and to indicate the types of trainer-led activities.

[R] Receptionists and Customer Service Representatives

[M] Doctors and Technicians

Ⓜ Managers and Owners

Trainer-Led Demonstration

Trainer-Led Explanation

Practice Exercises

Appendix

Training Evaluation

On-Site Training Prerequisite

To get ready for your on-site training, all trainees will use these recorded webinars to learn some of the most important Cornerstone windows and see how the IDEXX team will help guide you from this point to your on-site training event and first go-live day.

- Cornerstone Workflow Overview (3 mins)
- Intro to Main Window - Patient Clipboard (8 mins)
- Intro to Medical Notes and Documents (3 mins)
- Intro to Main Charge Collection Window - Patient Visit List (8 mins)
- Intro to Electronic Whiteboard (8 mins)
- Ensuring Your On-Site Success (5 mins)

Introduction to the Training Guide

Purpose

The purpose of this guide is to provide supporting instructions for new users as they complete the Cornerstone Basic Foundation taught by Cornerstone's certified instructors.

Getting Started

Throughout this guide, you will be working in the Cornerstone Tutorial Training Files, which contain realistic, but fictitious, client and patient information. The Training Files use IDEXX Cornerstone 8.1 and allow you to learn the materials without compromising your practice's actual data.

To maximize your training experience, complete your training using the training files at a Cornerstone workstation and work through all demonstrations and practice exercises.

To access the Training Files, click...

Start > **Programs** > **Cornerstone** > **Training Files** > **Cornerstone Tutorial**

Your trainer provides you with a user name & password. Use them to log into the training files.

User IDs and names		Passwords for: Users & Cashier	
User ID	User name	User	Cashier
t01	train01	t01	t01
t02	train02	t02	t02
t03	train03	t03	t03
and so on up to...		and so on up to...	
t50	train50	t50	t50

If user name and password is unknown, use: *User Name*: Cornerstone; *Password*: CS

Training Content

Content of the training includes 7 sections:

1. Getting Started
2. Patient Visit
3. End of Day
4. Additional Cornerstone Features
5. Practice Excercises
6. Appendix
7. Training Evaluation

Refer to the Table of Contents for a complete listing of sections, chapters and lessons.

To Complete Your Training

1. **Practical Application**: Demonstrations and practice exercises provide the opportunity for practical application of patient visit basics.

    Trainer-Led Demonstrations provide specific instructions and tasks for you to complete in the Cornerstone Training Files. These demonstrations provide a “hands on” training activity.

    [ ] Use the information in the brackets for Cornerstone data entry.

    Trainer-Led Explanations provide an explanation of the concepts.

    Important Information lists to important information; read this information carefully.

    Practice Exercises reinforce and confirm your skills with patient visit basics. Learners use the client they set up during the Trainer-Led demonstrations to complete the tasks listed. The practice exercises follow a scenario much like the one completed during the Trainer-Led demonstrations but not in a step-by-step format.

    When you see this image placed below a lesson name, it indicates that Snippets are available online at www.IDEXXLearningCenter.com for topics related to this lesson.

2. **Certification**: Basic Foundation Certificates of Completion will be issued to learners who request them and who complete and return certification requirements (for each learner) to your On-Site Trainer or fax/mail them using the information listed on the forms.

Basic Foundation: Section 1

Getting Started

Chapter 1: First Things First

You'll learn these important concepts within this chapter:

- **Your Practice's Cornerstone Goals** – Align staff understanding of owners' Cornerstone usage goals.
- **Log into Windows** – Successfully log into your Windows* operating system.
- **Log Into and Out of Cornerstone** – Successfully log into and out of Cornerstone.
- **Navigate Cornerstone** – Identify the parts of the main Cornerstone window.
- **Cornerstone Reference Resources** – Become aware of the Cornerstone resources and their locations such as Help Menus, User Guides, Snippets and the Cornerstone Support Center.

Your Practice's Cornerstone Goals Ⓜ

In this lesson, you'll discuss and record your practice's Cornerstone Goals. Examples of reasons practices install Cornerstone are: becoming chartless, achieving SmartLink* integration, standardizing medical care within the practice, controlling inventory, reducing missed charges, and better communication within the practice as well as between the practice and clients.

Record your practice's Cornerstone goals below:

1. ______________________________

   ____

2. ______________________________

   ____

3. ______________________________

   ____

4. ______________________________

   ____

5. ______________________________

   ____

6. ______________________________

   ____

Log into Windows R M

This lesson illustrates how to log into windows. It includes logging into your server, a workstation on a Domain Network, Peer-to-Peer Network, or a Thin-Client workstation (Terminal).

Important Notes: The following instructions assume your computer hardware was purchased from IDEXX Computer Systems **and** that it is running the Microsoft* Windows* 2008 R2, or Windows* 7, operating system. If either part of the previous statement is not correct, check with your hardware provider for instructions to start your dedicated server.

You may refer to the *Appendix* document: *Start Up Procedures* for additonal information.

The first image shown below is the Operating System's (OS) starting window. Windows* is the operating system on your computers. The appearance of initial windows may vary depending on the version of Windows* that your practice uses.

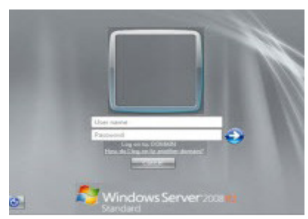
TRAINER-LED EXPLANATION

To log into Windows, server and workstations

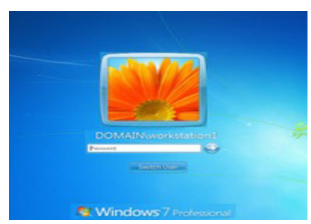
1. Turn on your computer, monitors and printers.
2. If prompted, press **Ctrl** + **Alt** + **Delete**.

3. Enter the listed information:

   3.1 Windows Server
   If prompted, list:
   - User Name: **Administrator**
   - Password: **Idexx123**

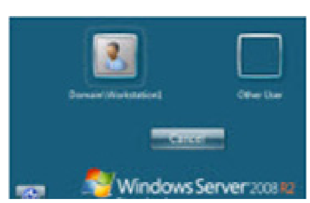


   3.2 Workstation on a Domain Network
   If prompted, list:
   - User Name: **Workstation#**
     (ex. Workstation3)
   - Password: **Idexx123**



   3.3 Server/workstation on a Peer-to-Peer Network
   If prompted, list:
   - User Name: **Staff**
   - Password: **Idexx123**

   3.4 Thin-Client Workstation (Terminal)
   If prompted, list:
   - User Name: **Workstation#**
     (ex. Workstation5)
   - Password: **Idexx123**



4. Click  or press **Enter**  to continue logging in.

Log into & out of Cornerstone

This lesson introduces you to the main Cornerstone window.

Access the Cornerstone Training Files with these instructions:
Select **Start** > **All Programs** > **Cornerstone** > **Training Files** > **Cornerstone Tutorial**

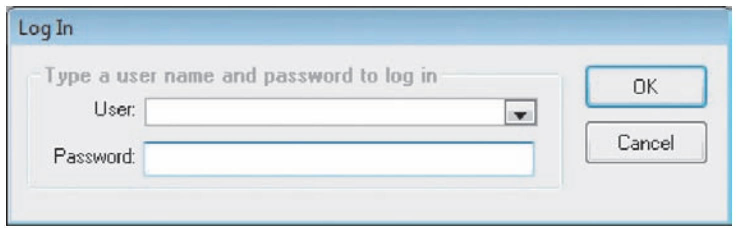
Access your live Cornerstone practice data with these instructions:
Select **Start** > **All Programs** > **Cornerstone** > **Cornerstone**

TRAINER-LED DEMONSTRATION AND EXPLANATIONS

Logging in and out of Cornerstone is simple and quick, which is especially important for the highest efficiencies and chartless practices.

Log into Cornerstone

Use these instructions to log into Cornerstone.



This demonstration has the time-saving feature of Password only login enabled. A *User Name* will not be selected/entered.

1. Select **Start** > **All Programs** > **Cornerstone** > **Training Files** > **Cornerstone Tutorial**. **[access the training files]**
2. In the Cornerstone Login window, leave the *User Name* blank and in the *Password* field type your password. For security purposes, asterisks or dots appear instead of the password. **[Use your assigned password.]**
3. Click **OK**. **[click OK]**

Switch Logged In User

Many practices successfully use individual logins and have individual staff members log off (CTRL + L) before leaving a workstation. This allows them to gain process efficiencies and data tracking.

TRAINER-LED EXPLANATION

*To switch users, close all windows by selecting Window > **Close all** or **ALT** + **W** + **A**. Then **CTRL** + **L**.*

Exiting Cornerstone

There are two ways to exit Cornerstone:

- Click the red **X** in the upper right corner of the Cornerstone window.
- Click **Exit**.

Navigate Cornerstone R M

This lesson introduces you to the main Cornerstone window and highlights how to navigate within Cornerstone.

TRAINER-LED EXPLANATION

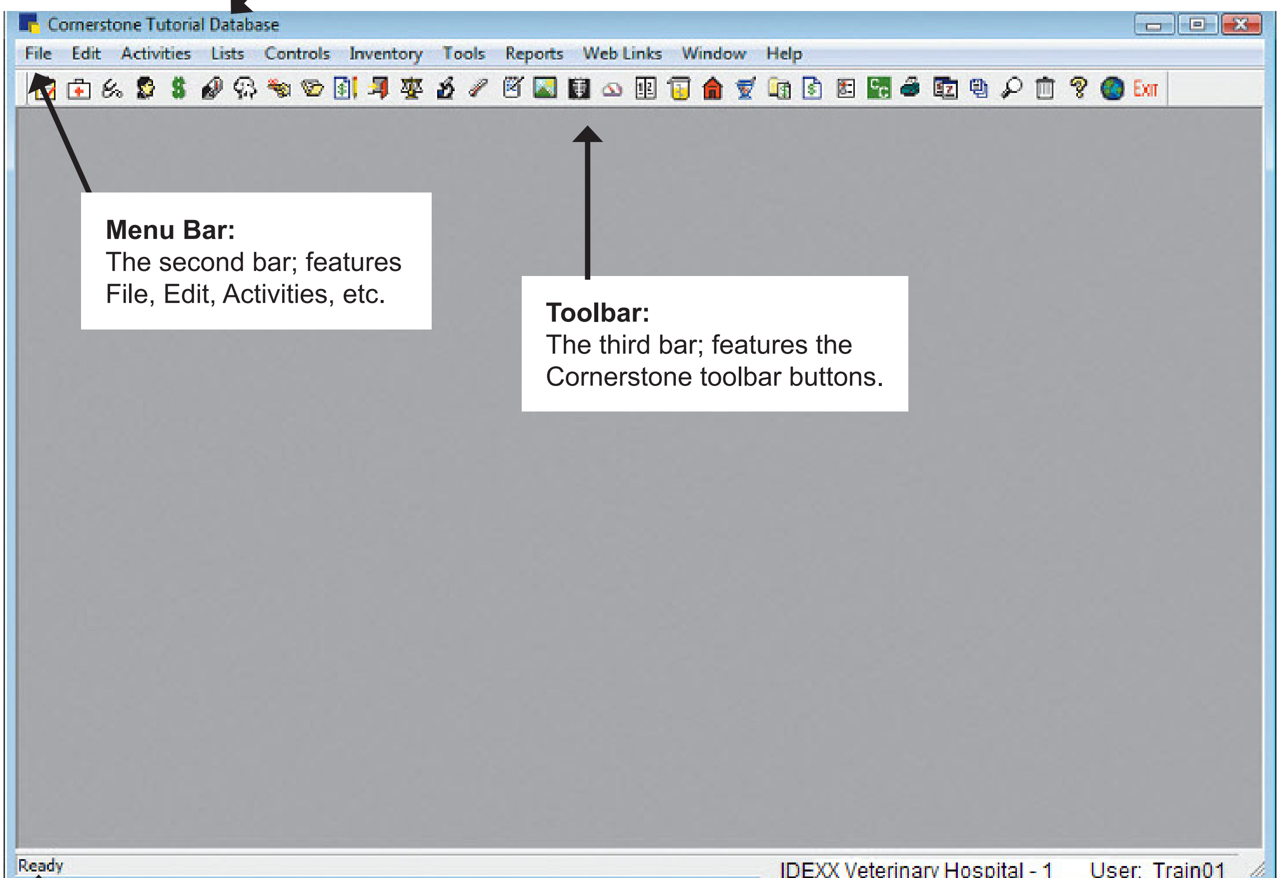
Learn about the main Cornerstone window.

Using the Cornerstone Window

The illustration below shows the different areas of the main Cornerstone window. These include the: *Title Bar*, *Menu Bar*, *Toolbar*, *Status Bar*, *Practice* and *User*. Understanding the areas of the *Cornerstone* window will allow you to quickly establish a basic starting point and status.

The Cornerstone Window

Title Bar:
Lists which module or active window is currently being used (ex. Cornerstone, Cornerstone Time Clock, etc.)



Status Bar:
Functions as a help bar, also called Micro Help, which provides the next step or action to take based on the position of the cursor.

Practice:
Indicates the practice the user is currently logged into. This feature is used primarily for multiple practice businesses.

User:
Indicates who is currently logged in to Cornerstone.

CORNERSTONE REFERENCE RESOURCES Ⓡ Ⓜ

This lesson includes additional information about features in Cornerstone.

Reference the valauble Cornerstone resources below, some of which are available on your workstation with others avaialble on the IDEXX Learning Center.

TRAINER-LED EXPLANATIONS

Learn where to access Cornerstone Help, Snippets, Cornerstone Administrator's Manual, Cornerstone User's Manual and the Online Cornerstone Customer Support Center.

Using Cornerstone Help

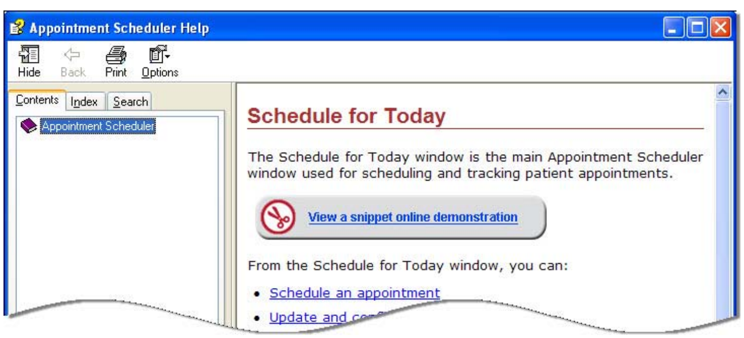
Cornerstone Help can be accessed three ways. You can:

- Press **F1** for content-specific help.
- Click the **Help** toolbar button
- Select **Help** on the **Menu** bar and select either **Contents** or **Search For Help On**.

Observe **MicroHelp** that displays on the left side of the **Status** Bar.

Access Snippets through Cornerstone Help Ⓡ Ⓜ

Snippets are 2-3 minute videos and provide quick answers to Cornerstone questions. To view the Snippets, your workstation must have Internet access and then these IDEXX Learning Center resources can be accessed as shown below.



Using Cornerstone Administrator's Manual and Cornerstone User's Manual

The *Cornerstone Administrator's and User's Manuals* are accessed through the Cornerstone. Program menu rather than through the Cornerstone software. Use the manuals to supplement your learning, gain additional information on a topic or help to answer questions you have in the future that you can't find the answers to in this guide.

The *Cornerstone Administrator's Manual* and the *Cornerstone User's Manual* can be accessed in one of two ways:

- Click on: **Start** > **All Programs** > **Cornerstone** > **Manuals**.
- From your computer's desktop, double-click the appropriate manual icon.

Online Cornerstone Customer Support Center

You can access the support center 24 hours a day, 7 days a week, 365 days a year just by:

- Selecting **Cornerstone** > **Help** > **Support Center**
- Clicking the **Support Center** toolbar button.
- Typing Cornerstonehelp.com in any internet browser

Chapter Summary

You learned these important concepts within this chapter:

- **Your Practice's Cornerstone Goals** – Align staff understanding of owners' Cornerstone usage goals.
- **Log into Windows** – Successfully log into your Windows* operating system.
- **Log Into and Out of Cornerstone** – Successfully log into and out of Cornerstone.
- **Navigate Cornerstone** – Identify the parts of the main Cornerstone window.
- **Cornerstone Reference Resources** – Become aware of the Cornerstone resources and their locations such as Help Menus, User Guides, Snippets and the Cornerstone Support Center.

Chapter 2: Clients & Patients

You'll learn these important concepts within this chapter:

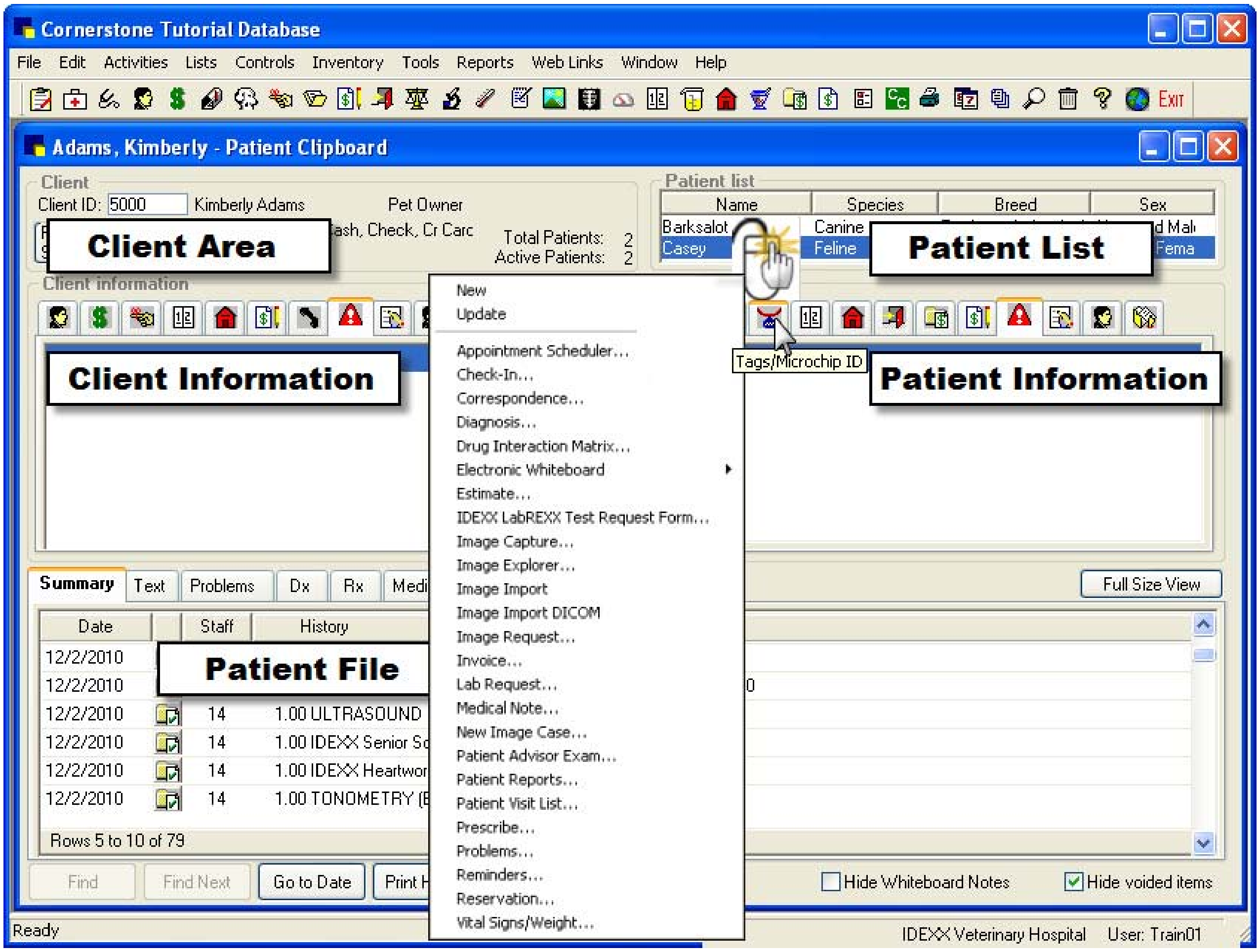
- **Patient Clipboard** - Acquire basic knowledge of *Patient Clipboard* contents and uses.
- **Navigate the Patient File** - Navigate the *Patient File*.
- **Client List** - Use the *Client List* to search for clients.
- **Client and Patient Accounts** - Gain understanding of process to add/update clients/patients.
- **Other Procedural Steps**

Patient Clipboard*

The *Patient Clipboard** is the most efficient window to start most client and patient tasks because of the wide variety of information available on one screen, important alerts and other important information that is only a few clicks away.

TRAINER-LED DEMONSTRATIONS

Navigate the areas of the Patient Clipboard, refresh and clear it using the account for Kimberly Adams.

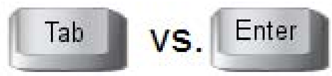


Click the right mouse button to access menus in each area, when available.

Review the 5 areas of the Patient Clipboard

1. Click the **Patient Clipboard** toolbar button.
2. Enter the *Client ID*. **[Enter ID 5000 for Kimberly Adams and press TAB.]**

   Trainee Note:
   Using Tab vs. Enter

   In the many software packages of today, including Cornerstone, it is important to understand the proper use of the **Tab** and **Enter** keys. **Tab** advances you to the next data field or option, while **Enter** can commit data changes when you aren't ready if the **OK** button is selected at the time. Incorrect use of the **Tab** or **Enter** keys could result in other required steps to correct an action. Your trainer will yelp you understand the use of these keys.
3. Review the 5 areas of the *Patient Clipboard*.

   The *Client* area displays the client's name and ID, classification, balance due, designated credit code, primary telephone number, and numbers of total and active patients.

   The *Client Information* area lets you view and access client and account information, patient reminders, scheduled appointments, reservations, estimates, phone numbers, alerts, prompts, notes and secondary account names.

   The *Patient List* area displays active, inactive and deceased patients owned by the client. If there are more than two patients, click the green arrow and move your cursor to the *Patient List* area to expand the list.

   The *Patient Information* area provides access to alerts, prompts, notes, owners, referral information, reminders, microchips, rabies tags, scheduled appointments and reservations. You can also access check-in information, a list of items on the *Patient Visit List* and current estimates.

   The *Patient File (patient history)* area displays the medical history for the patient selected in the Patient List. View information such as a summary of the patient's history, problems and diagnoses for the patient, a list of prescriptions, medical notes, lab results and vital signs/weights.

   In the *Patient Clipboard** areas, click the right mouse button to access menus of additional options.

Refresh the Patient Clipboard

Refresh the *Patient Clipboard* with the most recent data.

1. From the client's account in the *Patient Clipboard*, right-click in the *Client* area. **[Kimberly Adams' account (ID 5000) listed in the Patient Clipboard]**
2. Select **Refresh**.

Clear the Patient Clipboard

Clear the *Patient Clipboard* to help protect privacy.

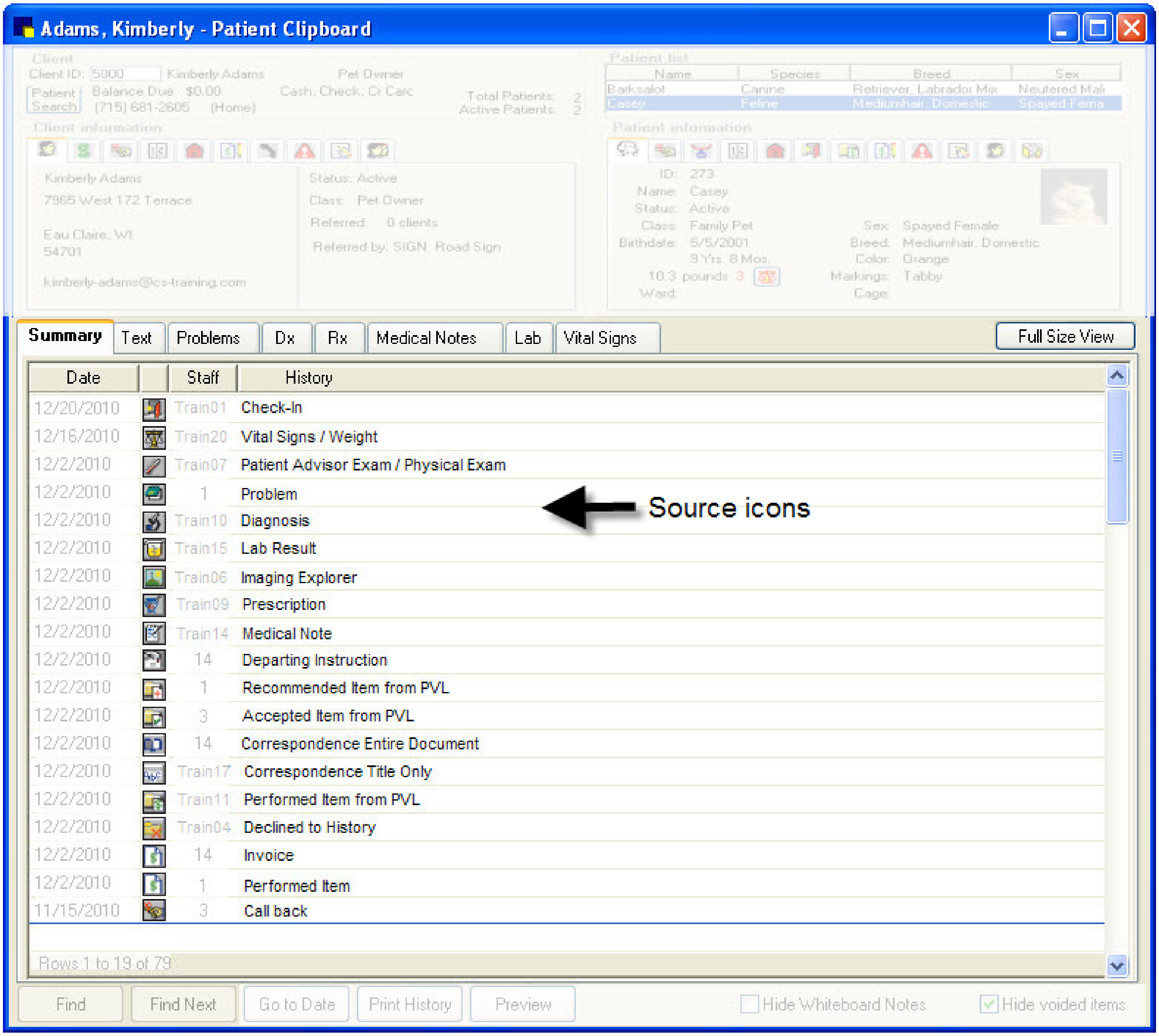
1. From the client's account in the *Patient Clipboard*, right-click in the *Client* area. **[Kimberly Adams' account (ID 5000) listed in the Patient Clipboard]**
2. Select **Clear.**

Navigate the Patient File [R] [M]

This lesson demonstrates how to navigate the *Patient File*. With a patient name selected in the *Patient List* area, you can navigate and search through the *Patient File* easily using the various source icons (see below) and by clicking on column headers to identify and sort history types.

TRAINER-LED DEMONSTRATION

Navigate the Patient File for Kimberly Adams (client) and Casey (patient) and learn the history types.

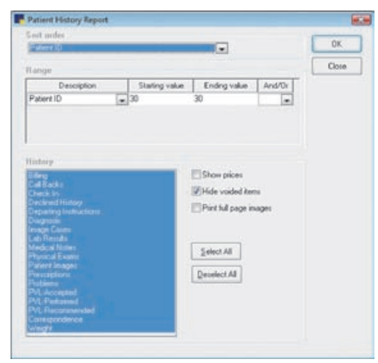


Use the *Summary* tab to see a one-line view of history entries. Use the *Text* tab to see the entire history entry, which can have multiple lines, and to search for specific history items using the **Find** button.

1. Enter the *Client ID*. **[Enter ID 5000 for Kimberly Adams and press Tab.]**
2. Select the patient in the *Patient list* area. **[Casey]**
3. Select the *Summary* tab to view all medical history entries for the patient.
4. Select the *Text* tab to see the entire contents of each line entry. **[Text tab]**
5. View and verify problems on the *Problems* tab. **[From the *Problems* tab, verify that this problem is listed in Casey's history: Oral Pain.]**
6. View and verfiy diagnoses on the *Dx* (Diagnostics) tab. **[From the *Diagnostics* tab, verify that there are 5 diagnoses listed.]**
7. Click the *Rx* tab to view, void, renew, correct and refill prescriptions. **[From the *RX* tab, right-click on the prescription for 50 tablets of Methimazole 5 mg, RX# 1076 dated 4/22/2010 and verify that this prescription does not have remaining refills.]**
8. The *Medical Notes* tab can be used to view finalized medical notes, update tentative medical notes and add notes to finalized medical notes. **[From the *Medical Notes* tab, right-click on the medical note dated 11/15/2010 and select Update. If prompted for a weight entry, click Cancel. View the medical note then close/cancel it without saving changes.]**
9. View Casey's lab results on the *Lab* tab. **[From the *Lab* tab, view your Casey's Endocrinology results and verify that Casey's T4 result from 04/22/2010 was 5.0 ug/dl.]**
10. View Casey's previous weights from the *Vital Signs* tab. **[From the *Vital signs* tab, verify that Casey's weight has not been less than 10 pounds.]**
11. Select the *Summary* tab again and click the **Full Size View** button 

for the full view of the *Summary* tab. **[Select the *Summary* tab.]**
    11.1. Click the **Normal View** button 

to return to the normal view. **[click Normal View]**
12. Optional: Use the **Print** button to print the patient's medical history.
    12.1 From the *Summary* or *Text* tab click the **Print** button.
    12.2 The *Sort Order* and *Range* have already been selected for you to print the report for the patient you have selected on the *Patient Clipboard*.
    12.3 In the *History* area, select the items you want to print on the report. You also have the option to select check boxes to print prices, hide voided items and/or print full page images.
    12.4 Click **OK** to print or **Close** to close without printing.



CLIENT LIST

This lesson introduces the *Client List*, which is a record of all of your clients.

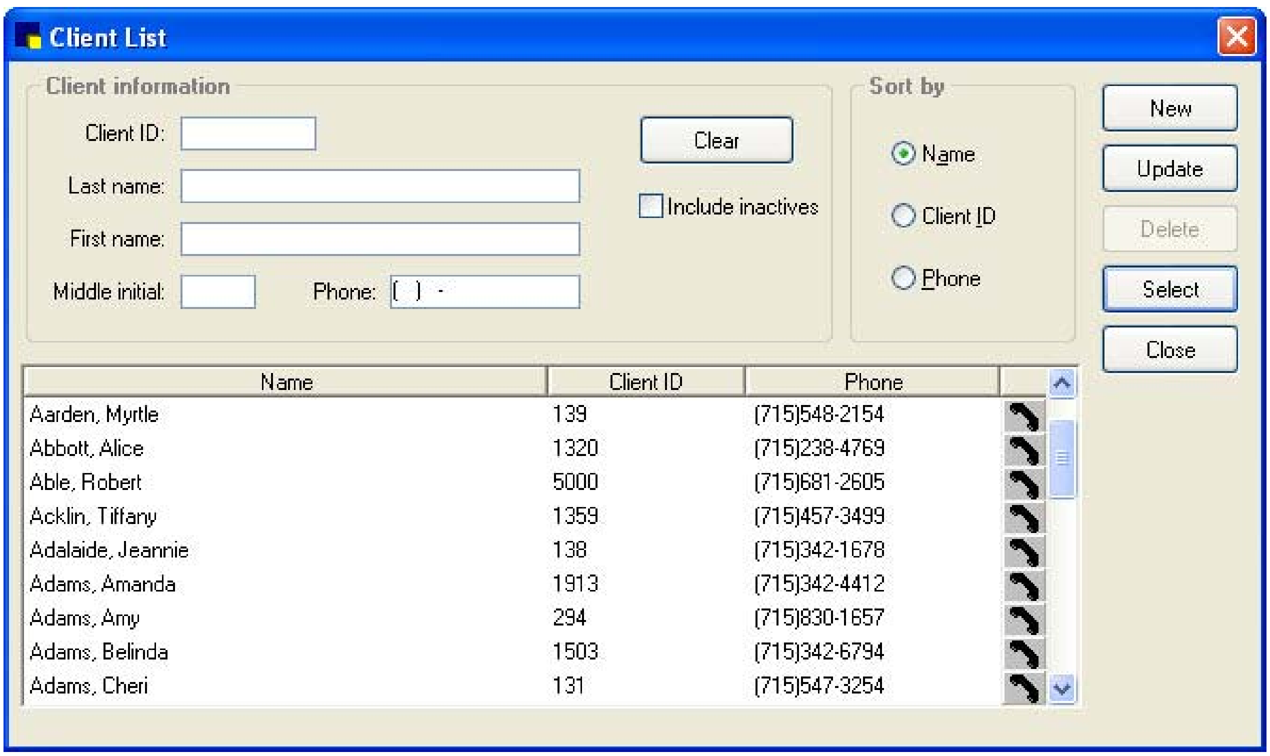
When searching from the *Client List*, you can search for active clients and inactive clients using a client's entire name or parts of their name.

If you choose:	Then:
New	Allows you to begin the process of creating a new client.
Update	Allows you to update client information
Select	The selected client's information displays in the previous window (For example, if you press **F2** in the *Client ID* field of the *Patient Clipboard*, clicking **Select** will bring you back to the *Patient Clipboard*).
Close	The *Client List* window closes without selecting a client.

TRAINER-LED DEMONSTRATIONS

Search the Client List to locate a client using a full name, partial name or phone number.

Search for Clients



1. From the Cornerstone toolbar, click the **Patient Clipboard** toolbar button. **[access the Patient Clipboard]**
2. Double-click or press **F2** in the *Client ID* field. **[double-click in the field]**
3. In the *Client information* area, select the **Include inactives** check box, if it is not already selected. **[select the check box]**
4. Fill in the search criteria fields with the information you have. **[Last name = Adams. Scroll to find Kimberly Adams, ID 5000]**
5. Select a client by double-clicking on the name. **[For this demonstration, do not select a client.]**
6. Click **Clear** to clear the *Client List*. **[Clear the Client List. Then, without closing, proceed to the next demonstration.]**

Search Using a Partial Name

1. In the *Last name* field of the *Client List*, enter the percent sign (%) and type a portion of the name or names you are searching for. **[%ms]**
2. In the *Sort by* area, select the *Client ID* option to change how the results are sorted. **[sort by ID]**
3. View the clients listed. **[View the list of clients whose last names contain "ms".]**
4. Clear the *Client List* and proceed to the next demonstrations. **[clear the list]**

Search Using a Phone Number

1. In the *Phone* field of the *Client List*, enter a phone number. **[715 681 2605. View the information.]**
2. **[keep the list open for the next demonstration]**

Client & Patient Accounts

Add new and update existing client and patient accounts to keep your client and patient records current. When implemented as a standard procedure, searching for a client prior to adding them helps to prevent duplicate client accounts.

TRAINER-LED DEMONSTRATIONS

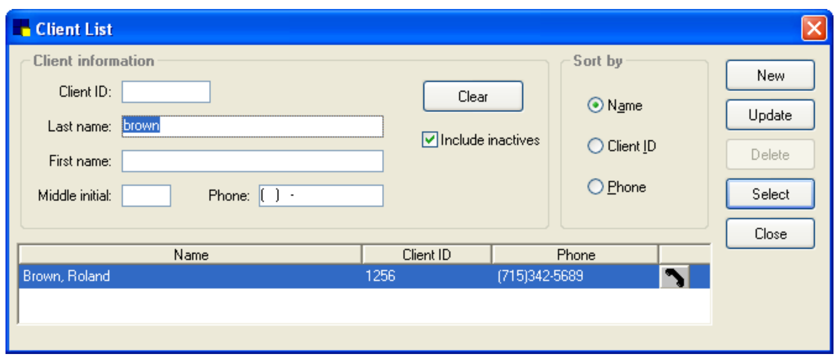
Claim an existing client account and customize it to make it your own then add a pet to the account.

Trainee Note: In the trainer-led activities throughout this guide, this client will be referred to as "your demonstration client".

Check for Client Currently in Cornerstone

1. From the *Client List*, verify that the **Include inactives** check box is selected.
2. Type the client's last name in the *Last* name field to verify that this client does not already exist in the database. **[type your last name]**

   Trainee Note: If, by chance, your last name is on the *Client List*, pretend it was not there so that the demonstration works out properly.



3. Click the **Clear** button to clear the *Search* fields in the *Client Information* area. **[Clear]**

Search and Update a Client Account

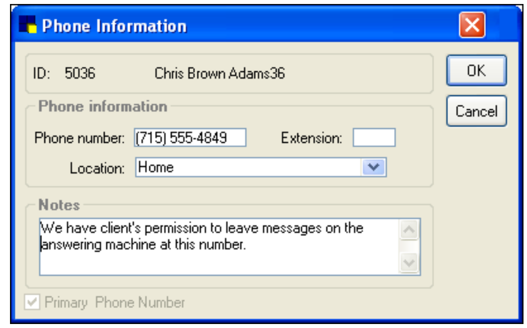
Search for and update an existing client account to be the account you will use in training demonstrations throughout this guide.

You will take one of the Kimberly Adams accounts (use IDs 5001 through 5050) and change the account to contain your own, or fictitious, information. This is the account you will use for the trainer-led demonstrations. (To accommodate multiple learners, there are 50 Kimberly Adams accounts.)

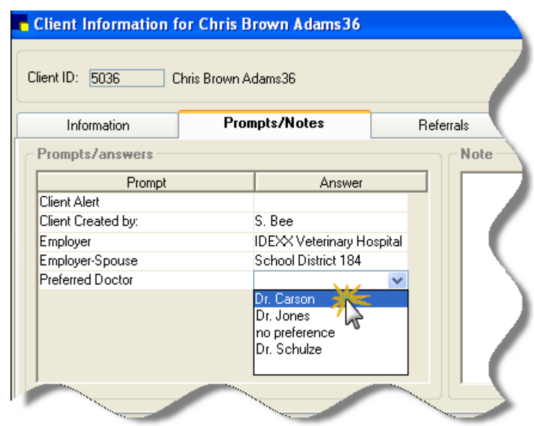
Instructions regarding changes to the account information follow.

1. From the *Client List*, search for an account. **[Last Name: Adams; First Name: %Kim]**
2. Select one of the accounts and click **Update**. **[Use the account that your trainer assigns to you.]**
3. Change the account information in the fields so they contain your own information: **[Title = your title, First name = your first name and your last name, Last name = do not change. Address = your address, Postal code = your postal code, City = your city, State/prov. = your state/prov., Email address = your email address. When complete, your name should be customized similarly to this** 

].



4. Select the check box for **Email reminders**.
5. In the *Phones* area, right-click on the first line and select **New**. **[Enter your phone number, select the Location from the list and type a note]**
6. Select the **Primary Phone Number** check box.
7. Click **OK**.
8. Click the *Prompts/Notes* tab. Enter *Answers* to the *Prompts.* **[Enter 'Client Created/Updated by:' enter your initials, your employer, select C. Schulze, DVM as your Preferred Doctor.]**



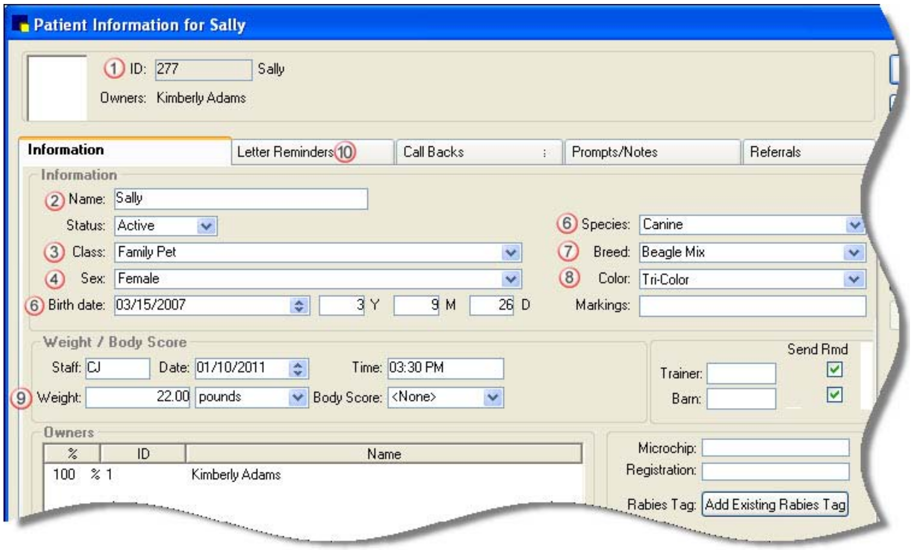
9. Select the *Information* Tab to add patients.
10. **[Keep the Patient Clipboard open and proceed to the next demonstration.]**

Adding Patients to a Client Account

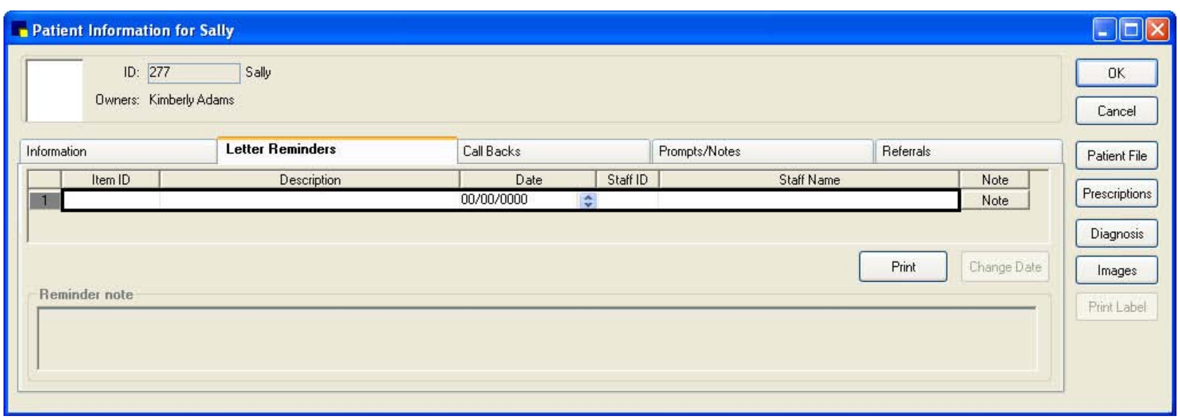
Add your own pet to this client account so you gain an understanding of unique functionality and fields like birthdate, breeds and reminders.

1. Right-click the *Patients* area of the *Information* tab and select **New**.
2. **Tab** past the *ID* field to accept the Cornerstone-assigned ID. Manually enter the ID if you prefer. **[Use your assigned Patient ID.]**
3. Select a *Class.* **[Family Pet]**

4. **Tab** to the *Sex* field, note that it is highlighted. A field that is highlighted indicates that you can make a selection by pressing the first letter of the option. **[choose Female]**



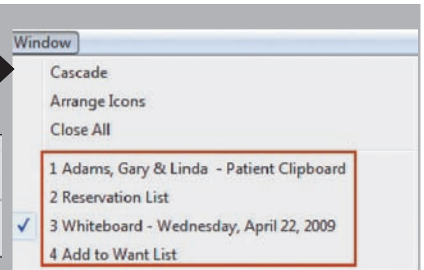
5. Enter the patient's **Birthdate** by entering the birth date or by entering the patient's age in **Y**, **M** & **D**. Filling in one option auto-populates the other. **[Enter your pet's Birthdate.]**
6. Select the *Species*. **[select an appropriate species]**
7. Select the *Breed* from the list. **[select a breed]**
8. Select a *Color* from the list. **[select a color]**
9. In the Weight / Body score area, enter the information for *Staff*, *Time* and *Weight*. **[Enter C. Schulze, DVM ID 14 for Staff, today's date, current time and enter your pet's weight.]**
10. Select the *Letter Reminders* tab. Enter the invoice item ID of the reminder, the due date, and staff. **[Enter 7500 Dental Examination. Due date = 1 year from today, Staff ID = 14.]**
11. Select the *Call Back* tab. Add future client calls by using pre-established call invoice items. Enter an Item ID, date to make the call, staff to make the call, and a call note. (Note: These can be viewed on the *Daily Planner* listed by the staff who is assigned to make the call. **[Enter Invoice Item ID = LAB-CB, Date: enter 1 day from today. Staff: CJ. Note: Follow-up on vaccinations]**



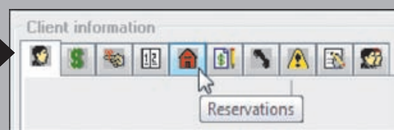
12. Click **OK** to save the patient's information. **[OK]**
13. Click **OK** to save the client's information. **[OK]**
14. In the *Client list* highlight the client and click **Select**. **[Select]**
15. In the *Patient list* area, find your recently created pet and highlight it. **[Highlight your pet.]**

16. Click the *Tags/Microchip ID* tab on the *Patient Clipboard*. **[Click the Tags/Microchip ID tab.]**
16. Right-click in the white area and select *Add Existing*. **[Right-click and select Add Existing.]**
17. Enter the tag information and click **OK**. **[Enter tag information and click OK.]**

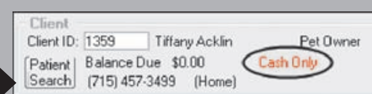
- Multiple *Patient Clipboard* windows can be used simultaneously.
- To locate and bring a *Patient Clipboard* to the front, select the **Window** menu. A list of the open windows displays. Select the one you want to view.



- While in the *Client Information* area, you can display the name of the tab by resting the cursor on it.



- When the **Alert** icon  is red, it means the client and/or patient has an alert in the *Alerts* tab. Please read and address the alerts!
- When the credit code is red, it means there is an alert associated with the credit code. (Ex. Cash Only)



- *Client Information* tabs can be rearranged or removed on the *Patient Clipboard* for staff members **Controls** > **Defaults** > **Staff** > *Toolbar* tab.
- Search fields are <u>not</u> case sensitive.
- Staff working in the receptionist and front desk areas should include inactive clients when searching for a client to be sure that a search is complete. Always search for a client before setting up a new account.
- To track new clients obtained through marketing efforts, create a “dummy client” with an easily recognizable ID (ex: FACEBOOK, WEBSITE) and enter that ID in the *Referrals* tab.
- To avoid duplicate discounts on a single item, assign only one discount to a client.
- All client IDs in Cornerstone must be unique.

Other Procedural Steps [R]

This lesson includes additional information on features in Cornerstone.

Adding Clients

1. From the *Patient Clipboard*, right-click in the *Client ID* field and select **New**.
2. **Tab** past *Client ID*.
3. On the appropriate tabs, enter the information needed.
4. Click **OK** to save the information.

Updating Patients

1. With the client's account selected in the *Patient Clipboard*, **right-click** on a patient's name in the *Patient* area and select **Update**.
2. Select the appropriate tabs to update and change the information.
3. Click **OK** to save the changes.

Entering the Patient's Weights

1. With the client's account displayed in the *Patient Clipboard*, from the *Patient information* tab, click the **Vital Signs/Weight** icon.
2. Double-click in the yellow cell that says "enter Weight" and enter the information for *Date, Time* and *Weight.*
3. Enter the *Staff ID*.
4. Click **OK** to save the information.

Adding Patient Reminders

1. Right-click on the patient's name in the *Patient Clipboard*.
2. Select **Reminders**.
3. Select the type of reminder.
4. Locate and select the invoice item ID.
5. Type the date that the item is due.
6. If a call back reminder, type a staff ID if a specific individual is to call the client.
7. Type a note, if required.
8. Select **OK** to save.

Printing Patient Reminder Report

1. With the client's account displayed in the *Patient Clipboard*, right-click on the patient's name and select **Reminders**.
2. Click **Print**. Choose to print reminders for all patients that belong to the client or for the selected patient only. Select the option to print the *Reminder Letter Report* or *Reminder Recall Report*.
3. Click **OK**.
4. Click **Print** to print the *Patient Reminder Report*.

Transfer Patient Ownership

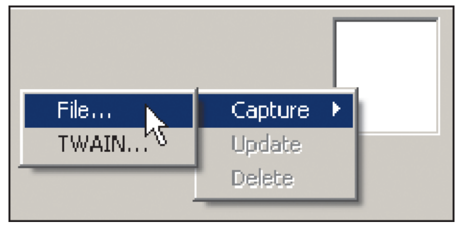
1. With the client's account displayed in the *Patient Clipboard*, right-click on the patient's name and select **Update**.
2. From the *Patient Information for Patient Name* window, in the *Owners* area, right-click on the Owner's name and select **Update**.
3. On the *Patient Owner Information* window, select **Past** in the *Status* area.

4. Click **OK**.
5. In the *Owners* area, right-click and select **New**.
6. In the *Client* area of the *Patient Owner Information* window, enter the ID of the new owner and press **Tab**.
7. Click **OK**.

Adding and Updating Pet Pictures

<u>Adding a Pet Picture</u>

1. From the *Patient Clipboard* select the appropriate patient in the *Patient list* area.
2. In the *Patient information* area from the *Patient Information* tab, right-click in the white rectangle.
3. Select **Capture**, then select **File**.
4. Select where the picture is located from the *Look In* list.
5. Double-click the picture file to insert it into the patient's file.



<u>Updating a Pet Picture</u>

1. To update the picture (crop, etc.), right-click the picture and select **Update**. The *Image Manipulation* window displays.
2. Use the tools on the left edge for image manipulation. The most common tool is the **Crop** tool.
3. To crop an image, first click the **Crop** button.
4. Determine the area to crop. Click and drag to identify the area on the image. A frame displays the outline of the cropped area.
5. If you are satisfied with the cropped image, click **Close**. A window will display and ask if you want to save the changes.
    - Click **Yes** to update the image.
    - Click **No** and it will remain the same as the original.

If you still want to crop the image, return to step 1.

If you clicked **Yes**, you will see the updated image in the *Patient Clipboard*.

Chapter Summary

You learned these important concepts within this chapter:

- **Patient Clipboard** - Acquire basic knowledge of *Patient Clipboard* contents and uses.
- **Navigate the Patient File** - Navigate the *Patient File*.
- **Client List** - Use the *Client List* to search for clients.
- **Client and Patient Accounts** - Gain understanding of process to add/update clients/patients.
- **Other Procedural Steps**

Basic Foundation: Section 2

Patient Visit

Chapter 1: Check-In

You'll learn these important concepts within this chapter:

- **Trainer-Led Scenario Overview** – Provides an overview of the trainer-led activities in Section 2 - Patient Visit.
- **Patient Visit Workflow** – Acquire understanding of the Patient Visit Workflow steps.
- **Appointment Scheduler - New Appointments** – Schedule an appointment.
- **Search Invoice Items** – Develop ability to search invoice items using more than one method.
- **Move Appointment** – Move an appointment.
- **Check-In & Related Documents** – Develop skills to check patients in and print check-in/related reports.
- **Census List** – Access the *Census List* to view checked-in patients.

Trainer-Led Scenario Overview R M

In Section 2 - Patient Visit, you will complete trainer-led activities using your demonstration client's account and Casey (Feline) and Barksalot (Canine).

Your trainer will lead you through demonstrations and practice exercises where a senior wellness visit progresses to a procedure. The Patient Visit Workflow steps and diagram that follow will position you to gain a solid understanding of how to use the most important aspects of Cornerstone.

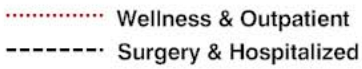
Patient Visit Workflow R M

The diagram on the next page illustrates the IDEXX Cornerstone training workflow. This workflow has eight components:

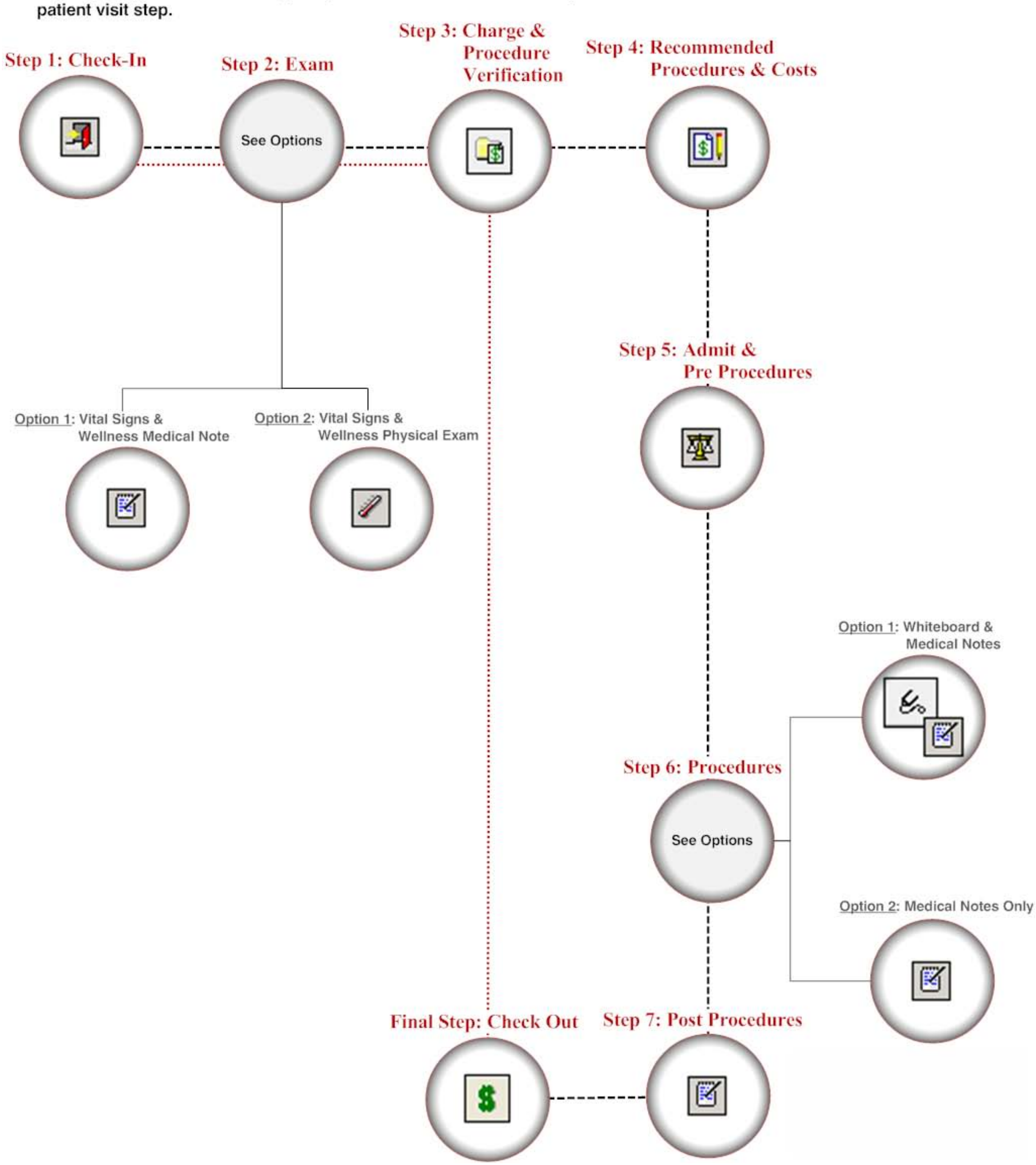
- Step 1 - Check-In
- Step 2 - Exam
- Step 3 - Charge & Procedure Verification
- Step 4 - Recommended Procedures and Costs
- Step 5 - Admit & Procedures
- Step 6 - Procedures
- Step 7 - Post Procedures
- Step 8 - Final Step - Check Out

Patient Visit Workflow

This Cornerstone* workflow illustration demonstrates key patient visit steps for two major patient visit types:



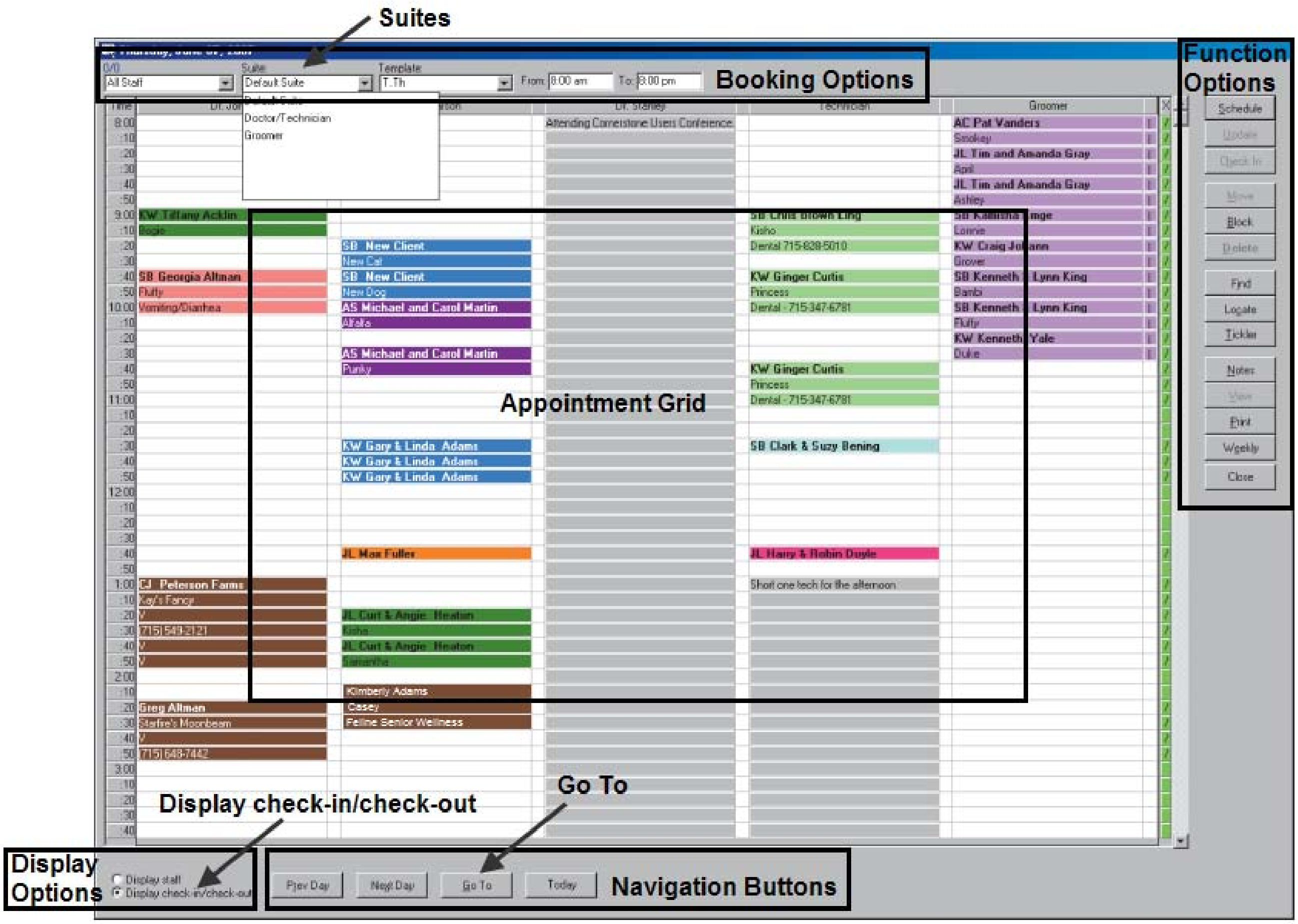
The steps represent the training chapters and the red text boxes represent the notable features used within the patient visit step.



Appointment Scheduler - New Appointments

This lesson highlights the Appointment Scheduler and its features. In the displayed image of the Appointment Scheduler you will see the location of the:

- Booking Options – at the top of the schedule
- Function Options – vertically on the right edge
- Navigation Buttons – at the bottom of the schedule
- Display Options – left, at the bottom of the schedule
- Appointment Grid – in the main area of the window



Appointment Scheduler window showing the Suite list.

- Suites – You can choose a suite for easier viewing of the schedule. Suites provide a way to group rooms together for customized viewing and scheduling.
- Go To – Use the **Go To** button to select a date from a calendar.
- The Display check-in/check-out option provides a view of the checked-in/out status of patients.
- You can set up the number of columns you want to view per *Suite*. Choices are: **4**, **6** or **8** columns. The set up of Appointment Scheduler is covered with your practice management team.

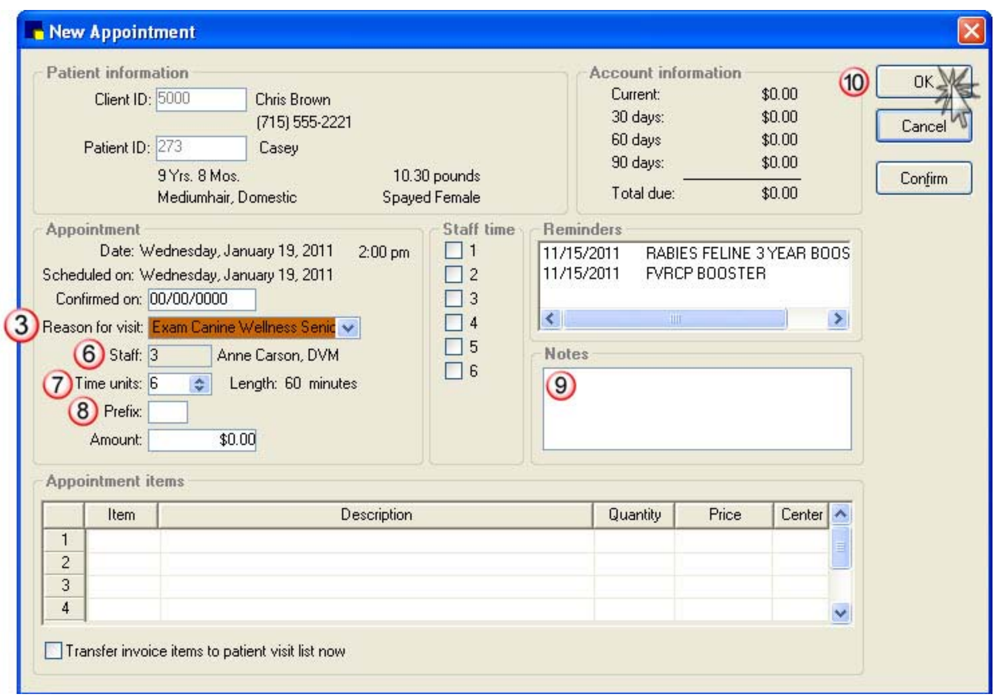
TRAINER-LED DEMONSTRATION

Using the Appointment Scheduler, make an appointment for Casey's Wellness Visit.

The appointments displayed in your Appointment Scheduler will differ from those shown in the lesson images.

1. With a client selected on the *Patient Clipboard** right-click the patient in the *Patient list* area and select **Appointment Scheduler**. **[Use your demonstration client and Casey and navigate to the Appointment Scheduler.]**
2. Select the correct day and time slot. Click **Schedule**. **[today, C. Schulze, DVM's column, assigned time slot]**
3. Click **Yes** to confirm the client and patient information. **[Yes]**

4. Applicable Compliance alerts are displayed so you are aware of eligible services and prices - which promotes informed communication with the client. Address the client/ patient alerts then click **OK** to proceed.
   4.1 From the alert windows, click on the alert. (Ex: Incomplete Address, Missing Birth date)
   4.2 Click **Process**.
   4.3 The corresponding window opens; enter the necessary information.
   4.4 Click **OK**.
   5.5 Upon returning to the alerts window, the processed alert still displays. To save the information and process the alert, click **OK**.
5. Select the *Reason* for visit. **[Senior Feline Wellness]**
6. Enter the *Staff ID/Room* for the appointment. **[C. Schulze, DVM]**
7. Enter the *Time units* for the appointment. **[accept 3 already listed]**
8. Optional: Enter the **Prefix**.
9. Optional: Add any **Notes** regarding the appointment. **[Client thinks Casey is staying for a Dental Prophy]**
10. Click **OK** to add the appointment information to the *Appointment Scheduler.* **[OK]**



Trainee Note: This demonstration is finished for now. However, it will continue in the next lesson. Please advance to the next lesson without closing the scheduler.

Search Invoice Items

Searching for and selecting invoice items is a key component of creating estimates, patient visit lists, invoices, etc.

This lesson provides the basics instructions about searching for and selecting invoice items. From the *Invoice Item List*, you can search for an item using an *Item ID*, *Item Description* or a portion of a word from within the *Description*. And, searches can be limited to specific classifications or item types.

Cornerstone has these inventory types:

Service - a service that you perform

Inventory - a product or item you sell

Group - a selection of items that has been created under one item ID

Pick - a list of items from which you can make a selection

Dispensing - an item that, when linked to an invoice item, provides an alternative to a dispensing fee

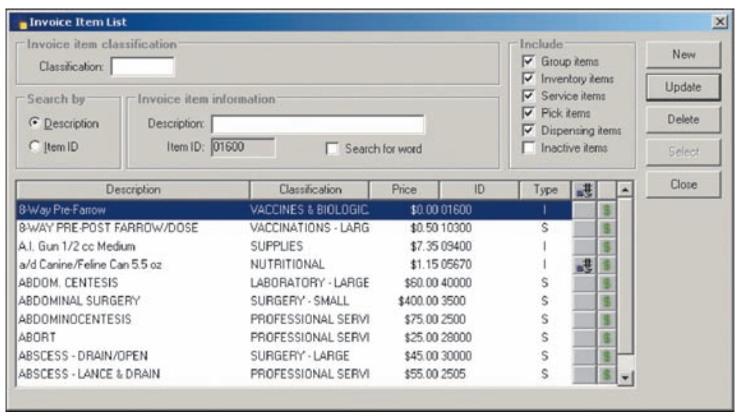
You can choose to use single invoice items or item combinations:

- Single invoice items - are set up as service or inventory items.
- Item combinations - are set up as groups, pick items or dispensing items.

TRAINER-LED DEMONSTRATION

Search for c/d Feline 8.5 lb bag (by description), add invoice item, but don't transfer to the Patient Visit List.

Trainee Note: You are continuing the Trainer-Led Demonstration from the previous lesson.



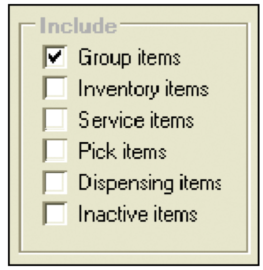
1. From the *Schedule for Today* window, double-click on the appointment to open it. **[Open your Casey's appointment.]**
2. In the *Appointment Items* area, on row #1, double-click in the *Item* field. **[double-click in the Item field]**
3. In the *Invoice item information* area, with the **Search for word** (Search for word) check box selected, type the *Description (or a partial description)* of the item you are searching for. You could also search using the **Item ID** option. **[type c/d to search for c/d Feline 8.5 lb bag]**
4. Double-click on the item to select it to add it in the *Appointment items*. **[select c/d Feline 8.5 lb bag, ID 05842]**
5. Optional: Select the (Transfer invoice items to patient visit list now) check box. **[do not select the check box]**
6. Click **OK**. **[OK]**

Searching by Classification

1. In the *Invoice Item* classification area, enter the ID for a *Classification*. Double-click or use **F2** to search.
2. Select a Classification.
3. The list will narrow to list only items in that classification.

Searching by Invoice Item Type

1. To narrow the search for a specific invoice item type, such as group items, deselect the check boxes for the remaining invoice item types in the **Include** area.



Move Appointment

From the Appointment Scheduler, you can move an appointment to another day, time or room.

TRAINER-LED DEMONSTRATION

Move Casey's appointment from its current time slot to another time.

1. From the *Schedule for Today* window, right-click the applicable appointment and select **Move**. **[Right-click the appointment for your demonstration client's Casey.]**
2. Click in the Room time slot that the existing appointment will be moved to. To move the appointment to a different day, click **Go To** and the *Date Selection* calendar will open so a new column/time can be selected. **[Click in your assigned time slot.]**
3. Answer the question *"Would you like to move the appointment to [Date selected] at [Time selected]?"* **[Answer = Yes]**

Check-In & Related Documents

From the *Appointment Scheduler*, check Casey in for a wellness visit as an outpatient and use protocol setting and efficiency features of reason for visit alerts and reason for visit documents.

TRAINER-LED DEMONSTRATION

From the Appointment Scheduler, you will check Casey in for a wellness visit.

1. From the *Schedule for Today*, select the patient's appointment. **[select your Casey's appointment]**
2. Click the **Check In** 

button. **[click Check-in]**
3. If alerts display, address them then click **OK** to proceed. **[address then OK]**
4. Verify that the *Staff ID* is correct. Select another *Staff ID* if needed. **[C. Schulze, DVM]**
5. Verify that the Client and Patient IDs are correct. **[your demonstration account and Casey]**
6. Verify that the *Reason for visit* is correct. Select another *Reason for visit* if needed. **[Senior Canine Wellness]**
7. Verify that the *Room* is correct. Select another *Room* if needed. **[C. Schulze, DVM (or use Overflow column if needed)]**
8. Optional: Select a *Ward*.
9. Optional: Enter a *Cage* name if needed.
10. Select a *Status*. **[<None>]**
11. If this is a referral recheck, select the **Referral Recheck** check box.
12. Make a selection for **Inpatient** or **Outpatient**. **[Outpatient]**
13. Optional: Enter any *Additional notes* or *Alert notes*. **[Additional Note: Ms. Adams thinks Casey is staying for a dental prophy.]**
14. Optional: If documents are linked to the Reason for Visit they display in the Documents area. If needed, select (add) *Documents* to print with the *Check-In Report*.

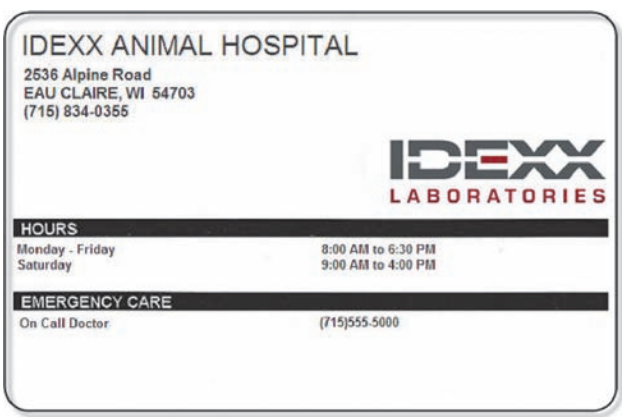
15. Optional: In the *Weight entry* area, enter the patient's *Weight*. Trainee Note: In a few more pages, during a demonstration, you will enter the patient's weight. Do not enter it here.
16. Optional: *Check-in Date* and *Time* can be changed if needed.
17. Optional: Click the **Travel Sheet** button to print a travel sheet with this client/patient information. **[view the Wellness Visit travel sheet then close it]**
18. Click **Check-in**. **[click Check-in]**

If a document is located in the *Documents* area and weight hasn't been updated, you may see:

19. After clicking **Check-in**, if the *Vital Signs* window displays, enter vital sign information as needed. Then **Close** the *Vital Signs* window. **[do not enter vital signs at this time]**
20. If prompted, enter a document *Staff ID*.
    20.1 If a document displays, made additions/changes as needed.
    20.2 Click **OK**.
    20.3 Select the appropriate print options.
    20.4 Click **OK** to save the changes and close the document.
21. At the *Check-in Report* message, select **Yes** or **No** to print or not print the report. If **Yes**, select the print options. **[No]**

Improve efficiencies at your practice by using Pet ID cards and PetDetect Collars. Utilize PetDetect collars to aid in pet identification and scan ID cards at check-in for instant access to client/patient information (approved scanning device is required).

Sample ID Card



(Sample front of two-sided card)

(Sample front of two-sided card)

PetDetect collars provide positive patient identification.

Census List R

The *Census List* provides a listing of patients checked-in to your practice. While the *Census List* is used throughout the day as needed, checking in patients generally occurs upon the patient's arrival. The *Census List* is easily accessed by pressing **F3**.

- Shows patient's physical location in the practice.
- Displays the time the patient checked in so you can see how long the patient was in your practice.
- Indicates which staff member the patient is going to see and the reason for the visit.
- Increases awareness of clients that have NOT been checked out or invoiced.
- Decreases occurrences of staff working with the wrong patient or client.

TRAINER-LED DEMONSTRATION

View the Census List to see the patients that are checked into the hospital.

1. Press **F3** to view the *Census List.* **[F3]**
2. Select which patients you want to *View.* **[Outpatients]**
3. Proceed by making other selections from the lists, selecting a client/patient and clicking **Check-in**, **Update**, **Check-out** or **Select**. View the latest data by clicking **Refresh**. **Close** the *Census List*. **[Close the list.]**

- When changing the date range to an earlier date, the date on the left must be changed first.
- Use the *Additional notes* field to enter general reasons for a visit, or to supply information and clarification. These notes will be saved in the patient's file.
- Use the *Alert notes* field to record notes that staff should see upon check-out.
- The **Referral Recheck** check box is used by referral practices seeing a referred patient for a recheck.
- Click the **Travel Sheet** button to print a travel sheet with the client/patient's information printed on it. If you select a *Reason for visit* before printing, the reason will also print.
- Printing options for the *Check-in Report* can be set in the practice defaults. **(Controls > Defaults > Practice and Workstation)** Set up options include: **Always ask**, **Always print** or **Never print**. Check-in reports can be reprinted.
- Information entered in the *Alert notes* area on the *Patient Check-in/out* window will display when other patient alerts appear such as the Invoice.
- *Reason for Visit* Alert notes can be set up under **Controls** > **Reason for Visit** and are viewed during scheduling the appointment and check-in.

Chapter Summary

You learned these important concepts within this chapter:

- **Trainer-Led Scenario Overview** – Provides an overview of the trainer-led activities in Section 2 - Patient Visit.
- **Patient Visit Workflow** – Acquire understanding of the Patient Visit Workflow steps.
- **Appointment Scheduler - New Appointments** – Schedule an appointment.
- **Search Invoice Items** – Develop ability to search invoice items using more than one method.
- **Move Appointment** – Move an appointment.
- **Check-In & Related Documents** – Develop skills to check patients in and print check-in/related reports.
- **Census List** – Access the *Census List* to view checked-in patients.

Chapter 2: Exam

You'll learn these important concepts within this chapter:

- **Daily Planner - Appointments & Patient Visit Clipboard** – Gain understanding of how to access and view appointments and access the *Patient Clipboard* from the *Daily Planner*.
- **Vital Signs & Medical Notes** – Develop skills to record vital signs from a medical note.
- **Smartlink Workflow** – Acquire understanding of the SmartLink Workflow steps.
- **Other Procedural Steps**

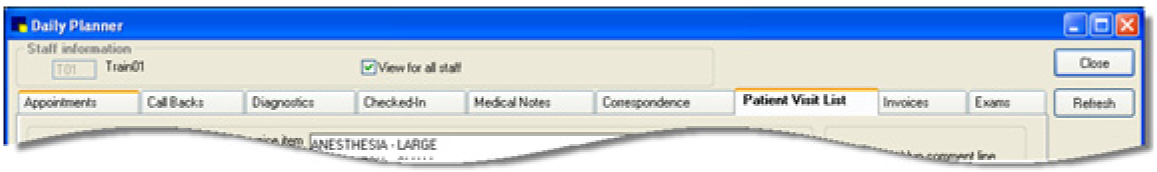
Daily Planner - Appointments & Patient Clipboard R

View a snippet online demonstration

This lesson introduces the *Daily Planner*, which features nine tabs of information and is valuable for receptionists, technicians and doctors to view checked-in appointments and patient information prior to entering the exam room.

The benefits of using the *Daily Planner* is that it becomes a quick method to view the checked-in information prior to the exam vs. starting from the *Appointment Scheduler* and viewing all the activity it contains.

Upon being notified that a patient has arrived, the technicians and doctors can navigate to the *Daily Planner* to view laboratory requests on the *Diagnostics* tab, then to the *Patient Clipboard* to review patient history information, alerts, and finalized estimates on the *Patient Clipboard*.



TRAINER-LED DEMONSTRATION M

Navigate to the Daily Planner > Patient Clipboard on behalf of C. Schulze, DVM.

1. Click on the **Daily Planner** toolbar button. **[click Daily Planner]**
2. Enter your staff ID. **[Enter 14 for C. Schulze, DVM.]**
3. Click on the *Checked-In* tab. **[click Checked-in tab]**
4. View the Appointment Notes for your patient. **[view the notes]**
5. Right-click your appointment that has arrived and select **Patient Clipboard**. **[Find your patient Casey and select Clipboard.]**
6. View alerts, history, and the *Patient Visit List* tab for information important to the appointment. **[view alerts, history and Patient Visit List tab]**

Vital Signs & Medical Notes M

After reviewing the check-in, the medical team has two basic options for entering medical notes. We present the options below with their advantages. The trainer-led demonstration that follows uses Option 1 with Option 2 steps presented in Other Procedural Steps.

Option	Advantages
1. Medical Notes (Document Template)	• Can dedicate certain pages of the document for the internal medical record and other pages for client or external purposes. This might be a procedure summary or discharge instructions, all within one document • Customizable forms • Ability to insert elements such as a table, checkboxes, text input fields and images • Invoice items can be entered within the template • Other Cornerstone features can be inserted and accessed, such as problems and diagnosis
2. Physical Exam / Report Card	• Standardized format that can't be altered by staff • Fewer layout and presentation decisions

Use the instructions found in the OTHER PROCEDURAL STEPS lesson if your practice will use the Physcial Exam/ Report Card feature for recording medical notes.

Before or during the medical note entry, the medical team can use the vital signs feature to enter vital signs, beginning with weight. Your practice's weight and vital sign entry process might look like this:

- Receptionist weighs and records weight in the check-in window
- Technician weighs and records during the medical note process

TRAINER-LED DEMONSTRATIONS

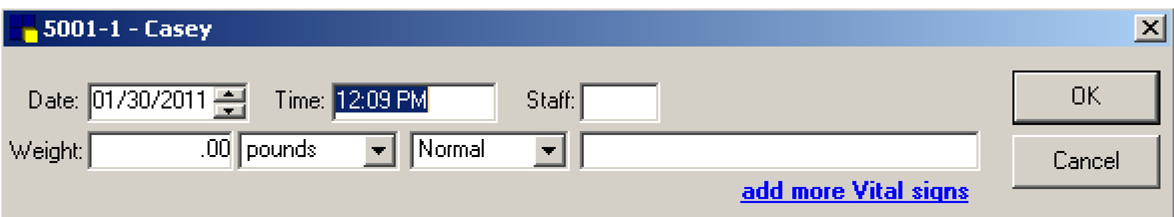
Enter Casey's weight and other vital signs during medical note entry.

1. Click on the **Patient Clipboard** toolbar button. **[click Patient Clipboard]**
2. Search or enter your client ID, then select your patient. **[Select your your demonstration client and click on Casey.]**
3. Right-click on the patient and select **Medical Note**. **[right-click Casey and select Medical Note]**
4. Enter your staff ID. **[Enter 14 for C. Schulze, DVM.]**
5. Enter a key word in the *Title* or *ID* field, select the document and click **OK**. **[Type 'wellness' and select Wellness Exam.]**

continued...

Vital Signs - Weight

The weight window allows you to begin the process of adding, editing and graphing vital signs, including viewing historic vital sign values.



6. Enter *Staff ID*. **[Enter CJ for Chris Jennings.]**
7. Enter weight, select the value rating, then click OK. **[enter 9.9 lbs and select Low]**

continued...

Medical Notes

8. Record technician in the *Tech* field of the medical note. **[enter Technician initials 'CJ' for Chris Jennings]**
9. Ask and answer the questions in the *History* area. **[answer the history questions appropriately]**

TRAINER-LED EXPLANATION

Before entering the vital sign values for Casey, your trainer will explain the fields and options for the Vital Signs window. You'll then enter values. Then, the trainer will explain vital sign editing rules.

The *Vital Signs* window includes the following fields and options:

Field/Option	Description
Hide voided records	When selected, voided vital signs sets (columns) do not display on the Vital Signs window.
Vital Signs column *(static left column)*	Displays Weight and all other vital signs activated in Vital Signs setup.
Create new Vital Signs set column *(right column)*	Allows you to add a new set of vital signs for a patient.
Inactive (I) vital sign	Inactive vital signs are listed on the Vital Signs window only if that patient has historic values for that vital sign. Inactive vital signs are marked with an "(I)" after the name.
"?" link	For Alphanumeric List and Numeric List vital signs, click this link to view the list values and their extended descriptions, if any exist.
Graph button	For Numeric and Numeric List vital signs, click this button to view the patient data in a graph and optionally print the graph.
Comments icon	Displays when a comment is associated with the entry. Hover the cursor over the icon to view the comment text.
Red abnormal indicator	Abnormal vital sign entries – those marked as High (H), Low (L) or Abnormal (A) – display in bold red text.
Refresh button	After edits or updates have been made and saved for a patient (at this workstation or elsewhere in the practice), click this button to ensure you are viewing the most recent data for the patient.

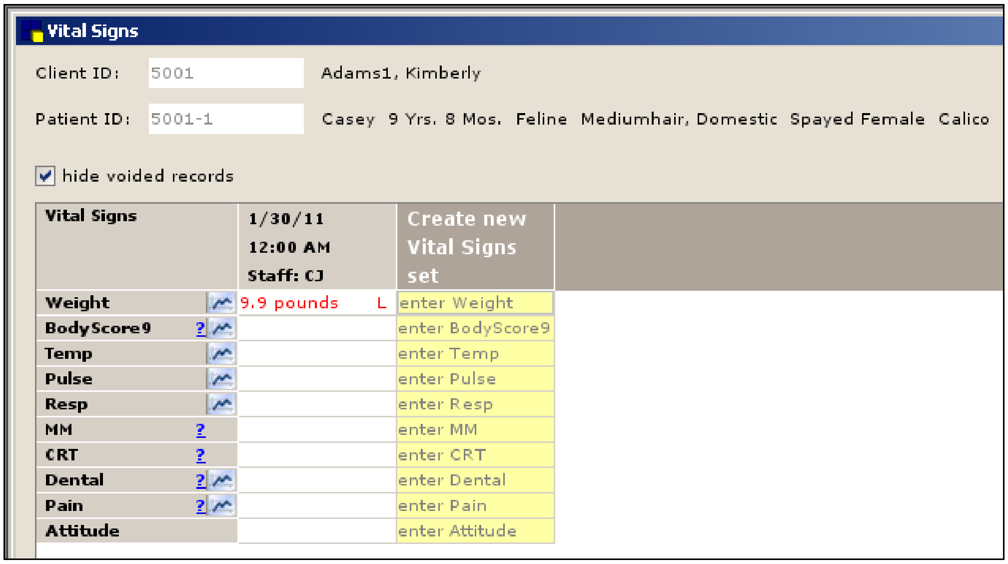
The Create new Vital Signs set column includes the following fields and options:

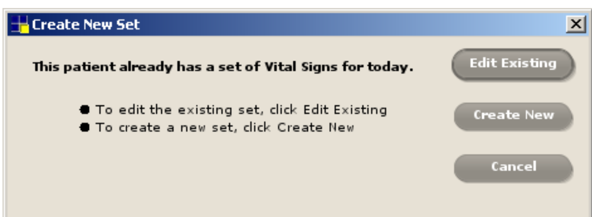
Field/Option	Description
Date/Time/Staff ID cell	This cell expands automatically when any other Create new… vital sign entry cell is selected. The *Date/Time/Staff ID* fields are required for each set of vital signs. Note that you cannot enter a date/time that is in the future or greater than 10 days old.
Text entry box or selection list	Depending on the vital sign type (Alphanumeric, Numeric List, etc.), the data entry/selection field may appear as a text box or a list.
"?" link	For Alphanumeric List and Numeric List vital signs, click this link to view the list values and their extended descriptions, if any exist.
Normal list	If the vital sign value is abnormal for this patient, alert staff by selecting High, Low or Abnormal from the drop-down list. A selection other than Normal will cause the value to display in bold red, along with an H, L, or A designation.
Enter comment	Type vital sign comments in the text box as needed (limited to 30 characters). The icon displays for an entry if a comment is associated with it.
None for species	Displays in a cell if the species has not been associated with a list for that vital sign. (To add the species to a list: Select **Lists** > **Vital Signs/Weight**, select the vital sign and click **Update**, select a list and then select the applicable species to associate it with the list.)

INSTRUCTOR-LED DEMONSTRATION M

Enter the vital sign values for Casey. Using this template, you'll experience using a vital signs hyperlink, 'Add Vital Signs' to access the Vital Signs window, which has the benefit of the information being included in a client report card.

1. Click 'Add Vital Signs' hyperlink, double-click 'Create new Vital Signs set', then click **Create New**. **[click Add Vital Signs, double-click Create new Vital Signs set and click Create]**





2. Enter the values and click gray **OK**. Select recording staff. **[enter the values listed below; select Chris Jennings]**

Vitals area*

[record these values]

- **Body Score 9 - 3 Slightly Underweight (L)**
- **Temp = 102.4 (H)**
- **Pulse = 210 (H)**
- **Resp = 80 (H)**
- **MM = Pale/Anemic (L)**
- **CRT = < 2 Sec (N)**
- **Dental = 4 Significant (H)**
- **Pain = 3 Moderate (H)**
- **Attitude**

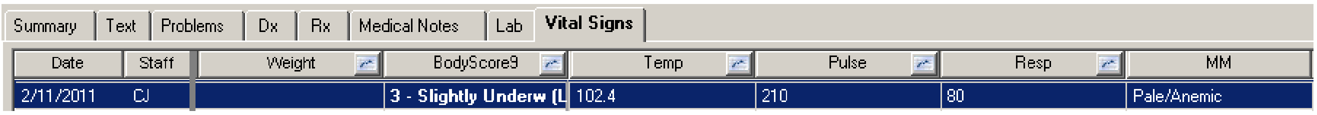
*A Vital signs link must be set up in the medical note template to allow for vitals entries. In the template, click **Insert** > **Vital Signs**.

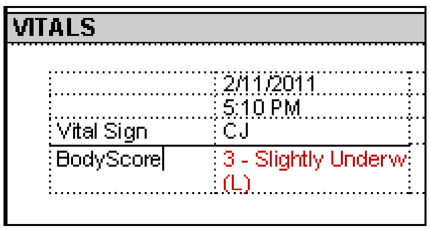
TRAINER-LED EXPLANATION M

Your trainer will explain the following vital sign entry guidelines and editing rules.

Vital Sign Editing Rules

Use the hyperlink, but don't deselect any of the vital signs from the *Vital Signs* window. This will eliminate the situation where the medical note would have different vital sign information then the vital signs in patient history (*Patient Clipboard*).





The ability to edit vital signs is based on the original date/time of the vital sign set. Follow these guidelines for editing existing vital signs sets:

- If the vital signs set was created within the last 24 hours, you may add values to blank vital signs and edit an existing entry (cell) within the set.
- If the vital signs set is older than 24 hours but created within the last 10 days, you may only add values to blank vital signs. No editing of existing entries is allowed.
- If the vital signs set was created over 10 days ago, no entries or editing is allowed. The key timeframes to remember are 24 hours and 10 days. Note that the editable timeframe is based on the server date/time when a vital signs set is created, which is not necessarily the date/time entered by the staff member.

TASK	Within 24 hours of initial vital signs set creation	More than 24 hours after initial vital signs set creation	Within 10 days of initial vital signs set creation	More than 10 days after initial vital signs set creation
Add a new vital sign entry (blank cell) within an existing set	Yes	Yes	Yes	Not Allowed
Edit a vital sign entry (occupied cell) within an existing set	Yes	Not Allowed	Not Allowed	Not Allowed

TRAINER-LED DEMONSTRATION

Complete the medical note using provided information below.

1. Record the physical exam finds. **[use the data below]**

   Physcial Exam Findings area
   [record the data below]

   - **Fecal Parasite = Negative - No entry required**
   - **Nose and Throat = Normal**
   - **Mouth/Teeth/Gums = Tartar, Calculus, Gingivitis, Periodontal Disease Stage ¾**
   - **Eyes and Ears = Normal**
   - **Coat and Skin = Normal**
   - **Lymph Nodes = Normal**
   - **Legs/Paws/Back = Normal**
   - **Nervous System = Normal**
   - **Heart and Lungs = Normal**
   - **GI Tract/Abdomen = Normal**
   - **Urinary and Genitals = Normal**

2. Complete the annual checklist section. **[use the data below]**

ANNUAL CHECKLIST					
Have	Need		Have	Need	
☐	☑	Heartworm Preventative Refill 6	☐	☐	Dog: Rabies: 3 year vaccine
☐	☑	Flea Preventative Refill 6	☐	☐	Dog: DHP-P ☐ DAP-3 ☐
☑	☐	Food	☐	☐	Dog: Bordetella
☑	☐	Vitamins/Supplements	☐	☐	Dog: Lyme Vaccine
☐	☑	Dental Care/Cleaning	☐	☑	Cat: Rabies: 1 year vaccine
☑	☐	Microchip Identification	☑	☐	Cat: HCP
☑	☐	Diagnostics	☐	☑	Cat: FVRCP
☐	☐	Other:	☐	☑	Cat: FeLV

3. Complete the *Invoice Items* and *Attachments* as needed. **[your trainer will provide details]**
4. Verify, add, and update document information for *HX description, Alert, Date, Autofinalize.* **[your trainer will provide details]**
5. Select a *Status*. **[Tentative]**
6. Click **OK**. **[click OK]**

Document Editor - Medical Note Functionality

TRAINER-LED EXPLANATION

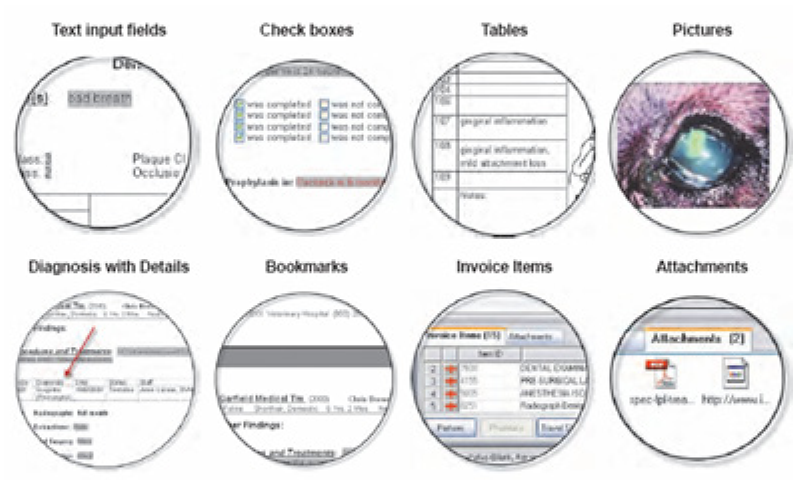
Your trainer will explain the flexible medical note functionality available in the Document Editor. Following, you'll complete the medical note using provided information.

You should be aware of the following:

- **Lock** the document to limit entries;
  - First Entry: With locked documents, double-click on the first text input field and make the entry. Note: During document setup, lock the document and select first cursor position. The first entry position will already be selected.
  - Tab: **Tab** to subsequent fields making entries as you proceed.
  - Unlock: To enter information in other locations, **Unlock** the document.

- Use the Cornerstone Editor toolbar buttons, menu bar and toolbar to insert **medical record features** (pictured below) or right-click to insert using the right-click menu.
  - Table: When working within a table, you are committed to using the menu bar only.
  - Problem: Enter multiple problems through the insertion of problem hyperlink.
  - Diagnosis: Enter multiple diagnoses through the insertion of diagnosis hyperlink.
- To expand the editor pane, grab the **Splitter Bar** and move it up or down or click the **Full Size View** button. Double-click on the **Client Banner** or Patient Banner to access the *Client Information* or *Patient Information* windows

Medical Record Features



Medical Note – Invoice Items Pane

TRAINER-LED EXPLANATION

You may choose the following entry methods for the combination of medical notes and invoice items:

- Default invoice items - to default invoice items on the template so that when a template is opened during the exam, the normal protocol and charges appear. Note: You'll experience differences when the invoice items are set with a blank status vs. recommended.
- Enter the invoice items - to enter the invoice items at the time of completing the medical note
- Reserve entering the charges for the next step - to reserve the charge entry for the next step, the *Patient Visit List*

Your key leaders will make a decision based on these advantages and potential gaps:

Advantages:

1. Invoice items and medical notes can be entered from one screen.
2. Staff can later review the medical note and related invoice items in history together. (Caution: Invoice items and pricing might have changed outside the medical note and therefore not reflected within the medical note.)

Potential Gaps:

1. SmartLink Imaging – If your protocol includes capturing a digital image using SmartLink, you'd enter the invoice item here and then will also have to access the window for the image request. Remember the benefit of SmartLink billing is to create a one-step process of making the request and capturing the charge. If you enter a SmartLink image invoice item in the invoice items pane, it will result in two steps and two invoice items on the *Patient Visit List*.

2. Patient Visit List Changes Don't Change Medical Note Entries – If a *Patient Visit List* entry change or add is made, it does not 'sweep back' and change the medical note entries. You must enter the change manually in the medical note.
3. Declined Recommendations – No Blue Line – If your practice declines recommendations and writes notations on the blue line, the blue line isn't available in the *Document Editor* window.
4. Estimates Don't Flow to Medical Note – If your practice standardly creates and finalizes estimates, the finalized estimate charges don't flow through to the medical notes. Therefore, your practice team would need to delete the duplicate charges due to the finalized estimate and the invoice items entered on the medical note.

SmartLink and Real-Time Care Workflows R M

Within the Cornerstone workflow, IDEXX SmartLink* technology allows a practice to make a diagnostic request from Cornerstone or IDEXX equipment while at the same time charging the client, with the request automatically submitted to the lab or imaging diagnostic equipment without reentering the client and patient information. Following, the results are transferred back to Cornerstone into the patient file.

SmartLink* Integration Advantages

SmartLink Integration offers superior advantages of captured missed charges and improved efficiencies, including the reduction of client and patient ID errors.

SmartLink In-House Lab
Enter in-house laboratory request in Cornerstone and the client is billed. Lab request and information automatically transfers to analyzer. Results are downloaded into Cornerstone patient history.

SmartLink Reference Lab
Enter reference lab requests in Cornerstone and the client is billed. Lab request and information is printed on a LabREXX* form and sent with the sample. Results are downloaded into Cornerstone patient history.

SmartLink Digital Imaging
Enter imaging request in Cornerstone and the client is billed. Imaging request and information automatically transfers to IDEXX digital imaging equipment. Results are downloaded into Cornerstone Patient History.

SmartLink Workflow Steps
1. Make request.
2. Run test or capture image.
3. Review results or images
4. Work with results or images.
5. Invoice client.

Real-Time Care provides diagnostic results during appointments and is a practice that helps increase compliance and lets staff make better use of their time as well as the client's time and provide continuity of care to their patients. Real-Time Care practices are able to see more patients, have greater compliance and head home at closing time each day.

Key Success Factors for a Real-Time Care™ Practice Work Flow

- Do you share a fundamental belief that providing results during the patient visit has a positive impact on client value, practice efficiencies and patient care?
- Are all of your doctors aligned on the same protocols?
- Do your technicians perform all nonveterinarian-specific activities during a patient visit?
- Do you schedule staggered appointments for sick and annual visits?

- Is your in-house laboratory complete and capable of providing you with diagnostic results within 15 minutes?
- Are your in-house protocols priced competitively and set up as group codes to gain compliance and efficiencies?
- Is your practice paper-light or chartless?

Other Procedural Steps

Recording Medical Record Using Physical Exam/Report Card

1. Access the feature. On the *Patient Clipboard*, select the client, then right-click on the patient's name in the *Patient list* and select **Physical Exam** (or **Patient Advisor Exam**).
2. At the *Patient Exam List*, click **New**. The *Physical Exam* window opens.
3. Under *Exam Information*, in the *Admit* field, press **Tab** to accept the date that appears in the field or select a different date. If known, type the *Release date*. Select the *Staff* responsible for the physical exam and the *Tech* (technician), if applicable.
4. In the *System template* field, the default physical exam template appears. If this template is not applicable, select the applicable template.
5. To add a body system to the physical exam, right-click anywhere on the physical exam and click **Systems**.
   - 5.1 A list of body systems appears. Click the check box to the left of the body system you want to add. Standard observations are included on the selected template. During the physical exam, you can select an observation status (**Normal**, **Abnormal** or **Did not Examine**) and can change the observation text to reflect the results of the exam.
6. To record exam observations and comments:
   - 6.1 If the exam is normal with no changes to observations, click **Save** or **Post**. Posted physical exams cannot be changed. Click **Save** if changes will need to be made to this exam later. Click **Post** to post this exam to the patient's history.
   - 6.2 To edit the observation text on the *Physical Exam* window, position cursor where you want to edit text and make editing changes.
   - 6.3 To change the status of an observation, right-click on the observation and select the applicable status—**Normal**, **Abnormal** or **Did not Examine**. The observation text will change to the default text set up for that status.
   - 6.4 To select a different set of preloaded observation text, click the magnifying glass icon to the right of the text you want to replace. A list of alternative observation text appears. Select the observation text to use.
   - 6.5 To add multiple lines of alternative observation text, do the following:
     - Anywhere on the physical exam, double-click or right-click and select **Update**.
     - Select the applicable system and status and click **Search**.
     - Under *Observation text*, from the list of observation text lines, click an applicable observation text line and click **Add**.
     - Repeat previous step until all applicable text has been added and click **OK**.
     - Click **Finish** to return to the physical exam.
     - To add a note or comments about the physical exam, click the **Note** button and type the text of your comments.
7. When finished making observations and comments, click **Save** or **Post**. (Click **Save** if changes will need to be made to this exam later. Click **Post** to post this exam to the patient's history.)
8. The Pet Health Report Card default print settings display. If applicable, you can choose to not print the report card, increase the number of copies and/or change the message. For practices using the Patient Advisor, additional Treatment Plan print settings are available. Click **Help** on this dialog box for information on these settings.

9. Click **Save** or **Post**. If you have chosen **Print**, the Pet Health Report Card prints. Specify the number of copies to print and (optional) change the footer message to print on the report card.
10. Click **Save** or **Post**.
11. View physical exams from any location that you can view patient history, such as the *Patient Clipboard*, by clicking the **Physical Exam** icon.
12. Access Physical Exam reports from the **Reports** menu > **Find a Report**.

    In the **Reports** list, click the plus sign to the left of Physical Exam to expand the list of Physical Exam reports.

    Open Physical Exam Report - lists all patients with open exams in admission date order.

    Several additional Physical Exam reports help you manage your observation text and templates.
    - *Observations Report*
    - *Physical Exam System Setup Report*
    - *System Template Setup Report*

Chapter Summary

You learned these important concepts within this chapter:

- **Daily Planner - Appointments & Patient Visit Clipboard** – Gain understanding of how to access and view appointment and access the *Patient Clipboard* from the *Daily Planner*.
- **Vital Signs & Medical Notes** – Develop skills to record vital signs from a medical note.
- **Smartlink Workflow** – Acquire understanding of the SmartLink Workflow steps.
- **Other Procedural Steps**

Chapter 3: Charge & Procedure Verification Ⓡ

You'll learn these important concepts within this chapter:

- **Patient Visit List** – Features, benefits and workflow of the *Patient Visit List*
- **Vaccinations & Rabies Certificates** – Complete the vaccination tag window and understand how the inventory setup and defaults can positively affect the efficiencies when the vaccine tag special action is set up or new vaccine or rabies inventory is used and entered on the fly to update the vaccine default information such as the manufacturer and producer.
- **Prescriptions** – Create a prescription for an inventoried pharmaceutical item.
- **Daily Planner Diagnostics** – View, schedule and complete call backs for lab results.
- **Other Procedural Steps**

Patient Visit List Ⓡ

The *Patient Visit List* provides a holding area for recommended and/or unbilled charges. This feature is used for the patient visit step of entering charges or verifying procedures and charges. In this lesson, we'll cover the following:

1. Workflow and Functionality
2. Charge Sources
3. Using the *Patient Visit* List window

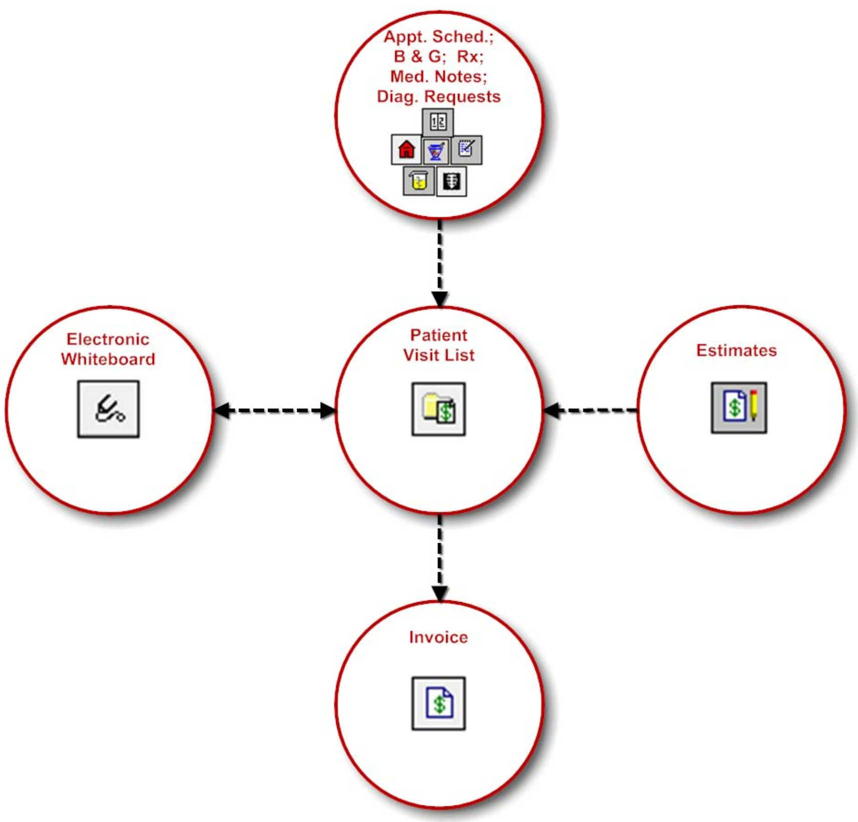
TRAINER-LED DEMONSTRATION

Navigate to Casey's Patient Visit List to verify the Wellness Group charges from a finalized estimate.

1. Click the **Patient Clipboard** toolbar button. **[click Patient Clipboard]**
2. Enter or find your client. **[Use your demonstration client account.]**
3. Select the pet, click the *Patient Visit List* tab and double-click the PVL content in the tab. **[Click on Casey and the *Patient Visit List* tab.]**

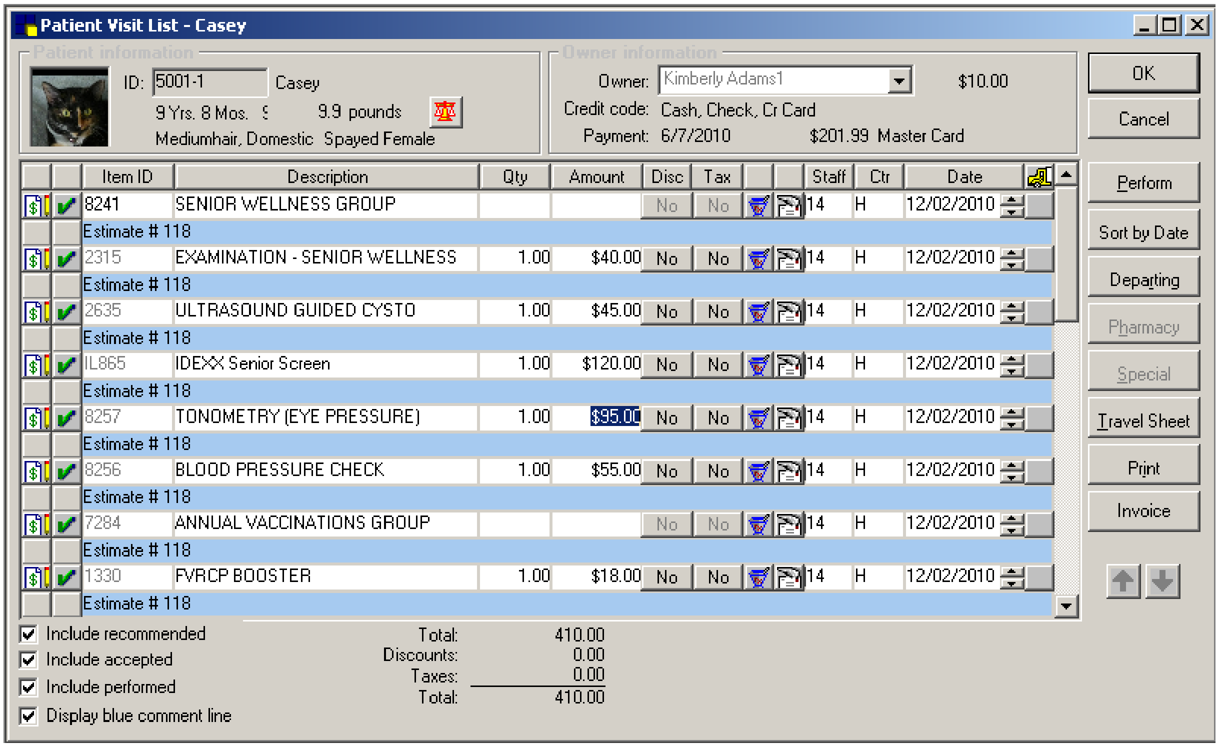
Workflow and Functionality

The charges flow to the *Patient Visit List* like this:



You would use the *Patient Visit List* (PVL) for these reasons:

- View patient and client information, including accounts receivable due (doesn't include the PVL charges)
- View the items and total charges on the *Patient Visit List*, excluding declined or declined to history invoice item amounts
- Decline to history, including the ability to write on the blue line a comment
- Use the last blue line to indicate to staff the patient is ready to go home (RTGH)
- Delete invoice items (CTRL + D)
- Change a departing instruction or create a prescription
- Put the invoice items in a particular order



Charge Source and Status

Use the illustrations below to learn the charge source and status icons.

The two columns of icons displayed to the left of the Item IDs are the **Charge Source** icon and the **Status** icon.

Charge Source **Status**

The **Charge Source** icons appear in the left-most column in the area where items are listed and help you identify how the item was added to the *PVL*. If no source icon is displayed for an item, the item was added directly to the *Patient Visit List*.

The **Status** icons are displayed in the column to the left of the Item IDs and show the standing of each charge on the *Patient Visit List*. Depending on the source of the items, some items may automatically appear with a certain status. The status for any item may be changed. The table below outlines each **Status** icon.

Status of items on a PVL:

 **Recommended** – The item has been recommended but not yet accepted.

 **Accepted** – The item has been accepted but not yet performed.

 **Performed** – The item has been administered or performed.

 **Declined** – The item has been declined by the client and will be deleted when the items are transferred to the invoice. There will be no history entry.

 **Declined to History** – The item has been declined by the client and will be deleted when the items are transferred to the invoice. A history entry indicating the item was recommended but declined will be listed in history.

TRAINER-LED DEMONSTRATION

On Casey's Patient Visit List, decline the Tonometry to history.

1. Right-click the status icon for the invoice item and select 'Decline to History'. Enter a reason on the blue line. **[Right-click the Tonometry status icon and select 'Decline to History'.]**

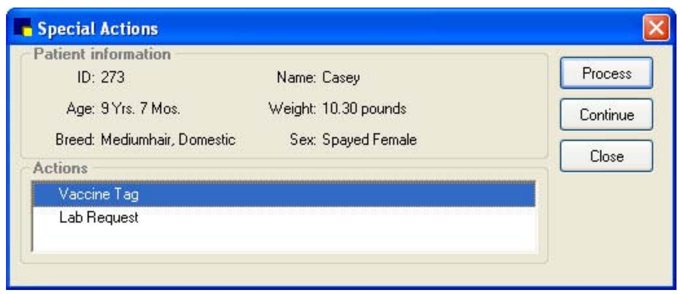
- When working in a *Patient Visit List*, use the scroll bar to access upper or lower portions of the list that may not be currently visible.

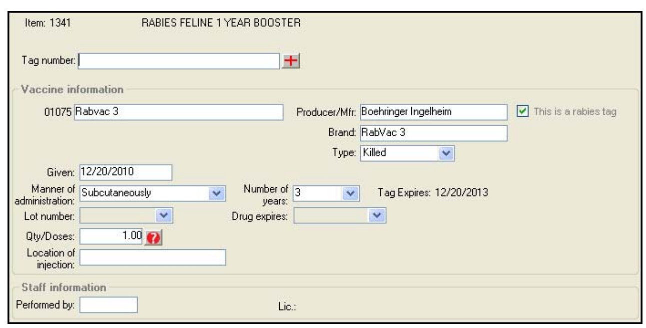
Vaccinations & Rabies Certificates

During the exam, you'll administer vaccinations and produce a rabies certificate using the *Vaccine Tag* window. This feature allows the auto-generation of rabies information for multiple year and species scenarios during the creation of the certificate. Also, efficiencies can be gained if the Vaccine Tag special action is attached to the invoice item. Additionally, when the team grabs a new rabies bottle, or tray and enters the rabies information on the *Vaccine Tag* window, it automatically updates the rabies default.

TRAINER-LED DEMONSTRATION

Complete the ***Vaccine Tag*** *special action to record the vaccine for Casey's vaccination.*





1. From the *Patient Visit List*, click the **Special** button. **[Special]**
2. Select the **Vaccine Tag** action and click **Process**. **[Select Vaccine Tag and click Process.]**
3. From the *Vaccine Tag* window, enter the *Tag* number. Optional: Click the **Auto Increment** button to generate the tag number (last user number +1). **[Click the auto increment button.]**
4. Enter the updated vaccine information for:
   - 4.1 *Vaccine name* [**Rabvac 3**]
   - 4.2 *Producer/Mfg* [**Boehringer Ingelheim**]
   - 4.3 *Brand* [**Rabvac 3**]
   - 4.4 *Type* [**Killed**]
   - 4.5 *Given* [**today's date**]
   - 4.6 *Manner of Administration* [**subcutaneously**]
   - 4.7 Enter *Number of years.* **[1]**
   - 4.8 Select the lot number from the list. If the appropriate lot number does not appear on the list, add it. **[Lot Number = 123456789]**
   - 4.9 To populate the *Drug expires* field, select the expiration date from the list. If the appropriate date does not appear on the list, add it. **[Drug Expires = 09/29/2012]**
   - 4.10 Enter *Qty/Doses.* **[1]**
   - 4.11 Enter Location of injection. **[RR hip]**

   Trainee Note: Carefully enter the default data. It impacts history and certificates for the patient you are working with and also impacts the next patients too - until new default data is entered. The first person to enter Vaccine information will set the default data. Subsequent entries will use the default data. So, your trainer will assign one person to enter the default data and other learners will complete their vaccine tag information after the default data is entered.
5. Enter the appropriate staff ID in the *Performed by* field. **[C. Schulze, DVM]**
6. Select the **Print Certificate** check box. **[de-select the check box]**
7. Click **OK**.

IDEXX Veterinary Hospital
2536 Alpine Road
Eau Claire, WI 54703
(800) 283-8386

Rabies Certificate

Client ID:	1	Patient ID:	273
Client Name:	Kimberly Adams	Patient Name:	Casey
Address:	7965 West 172 Terrace	Species:	Feline
		Breed:	Mediumhair, Domestic
	Eau Claire, WI 54701	Sex:	Spayed Female
		Color:	Calico
Phone:	(715)681-2605	Markings:	
		Birthday:	05/05/2001
		Weight:	10.30 pounds on 11/15/2010

Tag Number:	100014	Vaccination Date:	12/20/2010
Lot Number:	123456789	**Expiration Date:**	**12/20/2013**
Rabvac 3			
Producer:	Boehringer Ingelheim		
K / MLV / R:	Killed Virus		

Staff Name: C Schulze, DVM
License Number: 765982

Trainee Note: The invoice item setup for this training demonstration includes:

1. Rabies Feline 1 year Booster Invoice Item with rabies tag special action applied before invoice is posted
   Lists > **Invoice Item** > select item > *Special* tab
2. Rabies Feline 1 year Booster to maintain QOH
   Lists > **Invoice Item** > select item > *Inventory* tab
3. Set Vaccine defaults
   Lists > **Invoice Item** > select item > *Vaccine* tab

PRESCRIPTIONS M

View a snippet online demonstration

TRAINER-LED DEMONSTRATION

Casey is negative for heartworms, create her Revolution prescription.

1. With the client's account displayed in the *Patient Clipboard*, right-click the patient's name in the *Patient list* area and select **Patient Visit List. [using your Casey, select Patient Visit List]**
2. At the *Item ID* field, press **F2** to locate and select the medication from the *Invoice Item List.* **[Heartworm preventative, ID 7339, Revolution Feline 5-15 (3).]**
3. In the *Patient Visit List*, **Tab** to the *Qty* column and enter the appropriate quantity to dispense. **[1]**
4. On the line for this item, click the **Prescription** button. **[click the Prescription button]**

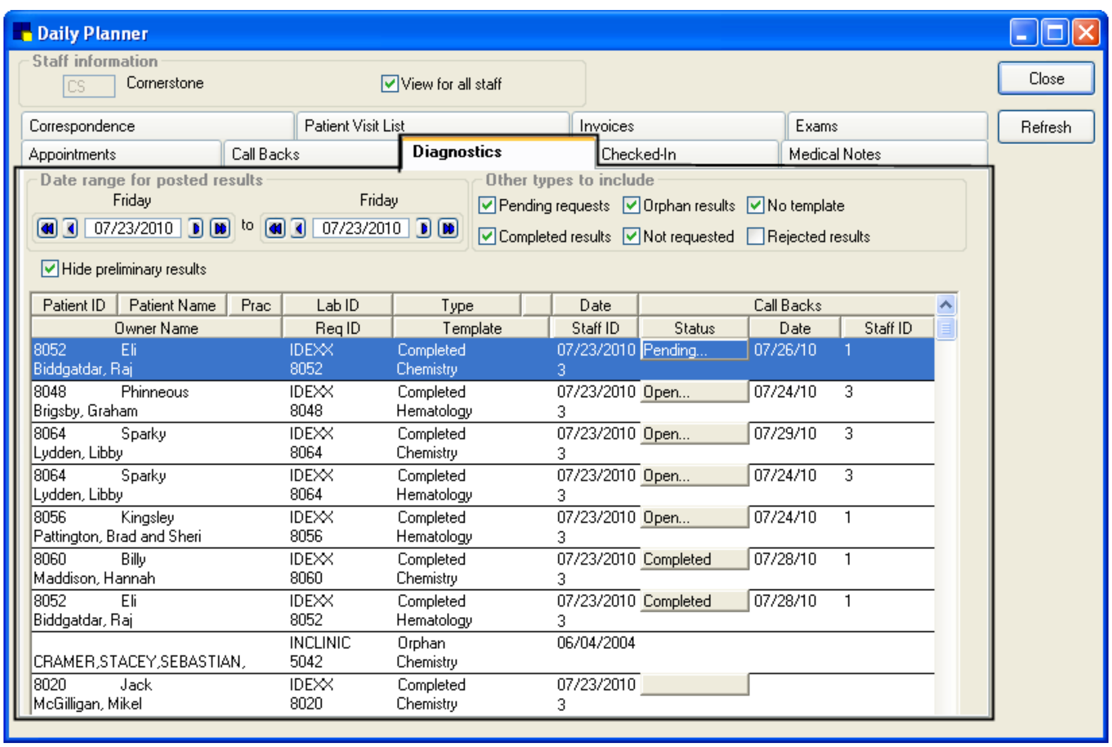
5. Confirm the correct *Quantity*, enter the number of *Refills* (if appropriate), *Date provided*, *Expiration date and Lot Number* of the drug (if necessary) *Prescribed by* and *Filled by*. **[Quantity = 1 bottle, Refills = 0, Date provided = today's date, Prescribed by = C. Schulze, DVM and Filled by = Chris Jennings]**
6. Click **OK**. **[click OK]**
7. Double-click in the *Instruction ID* field and select an appropriate instruction. Or, accept the instruction listed and click **OK** when the prescription information is complete. **[Accept the instruction listed and click OK.]**
8. When the prescription information is complete, click **OK**. **[click OK]**
9. Accept, or modify, the printing information and click **OK**. **[do not print]**
10. When prompted for *Pharmacy Sheets* make the appropriate selections and click **Print** or **Close**. **[click Close; do not print]**
11. Click **OK** to save the *PVL* information and close the window. **[Close the *Patient Visit List*.]**

See the **OTHER PROCEDURAL STEPS** lessons for Prescription tasks of Reprint, Void, Reissue Rabies Certificates.

Daily Planner Diagnostics R M

View a snippet online demonstration

Use the *Diagnostics* tab of the *Daily Planner* to view lab requests and results, assign technicians, lab result callbacks and calls to make.



TRAINER-LED DEMONSTRATION

View and update C. Schulze, DVM's Lab Requests/Results on the Diagnostics tab (basic steps).

1. With the applicable staff member (or all staff) specified at the top of the *Daily Planner*, click the *Diagnostics* tab. **[C. Schulze, DVM]**
2. In the *Date range for posted results* area, select the date range the posted lab results you want to review (default number of days set in Daily Planner defaults). **[View only Posted results for 01/06/2011 to 01/06/2011.]**
3. In the *Other types* to include area, select the check boxes for the lab types you want to view (default types; set types in Daily Planner defaults).
4. Once the date range and types have been set, you can view all existing lab results/requests and their current call back status for the selected staff member (or for all staff).
5. Right-click on a request or result.
   Depending on the lab type/call back status, the following options may be available:
   - Select **Update Lab Request** to open and update a pending lab request. Click the **magnifying glass** icon to view the requested tests.
   - Select **Update Lab Result** to open and update a recently received lab result.
   - Select **Update Call Back** to open the *Patient Reminders* window and update an open or pending call back.
   - Select **Patient Clipboard** to open the patient's record in the *Patient Clipboard*.
   - Select **New Lab Request** to open the *New Lab Request* window to enter a lab request.
   - Select **Refresh** (at any time) to add the most current result date to this tab.

Working with Call Backs on the Diagnostics Tab

The *Diagnostics* tab conveniently provides a single location for managing lab call backs. The *Call Backs* columns (**Status**, **Date** and **Staff ID**) allow you to keep track of lab call backs and access call back options with a single click.

TRAINER-LED EXPLANATION

Make a first call back immediately for a listed lab result.

1. Click the **blank status** button associated with the lab result and select **Call now**. The *Call now* window appears.
2. Enter the **staff ID** of the staff member who is making the call.
3. Depending on the result of your call, set the call back status to **Open**, **Pending** or **Completed**.

TRAINER-LED DEMONSTRATION

Schedule C. Schulze, DVM's lab result call back for Casey.

1. Click the **blank status** button associated with the lab result and select **Schedule a call back**. The *Schedule a call back* window appears. **[senior wellness results for your client's Casey]**
2. Enter the **staff ID** of the staff member you are scheduling to make the call. **[C. Schulze, DVM]**
3. Set the date for the scheduled call back. **[tomorrow's date]**
4. Enter a note for this call back. **[Discuss lab results; Casey having dental prophy tomorrow. No client action necessary.]**

Once scheduled, and after Refreshing the *Daily Planner*, the staff member can then view and process the call back from the *Daily Planner Call Backs* tab.

TRAINER-LED EXPLANATION
Updating an open or pending call back.

1. Click the **Open** or **Pending** status button associated with the lab result. The Note for (*lab callback item) - Lab Call Back* window appears.
2. Enter the **Staff ID** of the staff member who is making the call.
3. Depending on the results of your call, set the call back status to **Open**, **Pending** or **Completed**.
4. Enter a note regarding the call status.

TRAINER-LED EXPLANATION
Viewing notes for a completed call back.

Click the **Completed** status button associated with the lab result. All associated call back notes display in a *view-only* window. (Call back notes are also available in patient history if needed for future reference.)

Other Procedural Steps M

This lesson contains additional steps on the topic *Patient Visit List.*

Transferring Charges to the Patient Visit List

1. From the *Patient Clipboard**, select the patient in the *Patient list* area.
2. Click the *Patient Visit List* tab in the *Patient information* area.
3. Open the *Patient Visit List*.
4. All items from any source will be transferred to the *PVL*.
5. Make any adjustments to the *Patient Visit List*.
6. Click **OK** to save changes.

Adding Departing Instructions from the Patient Visit List

1. From the *Patient Visit List*, click the **Departing Instruction** toolbar button for an item.
2. Locate and select the desired instruction.
3. Click **OK**.

Viewing and Updating a Specific Patient Visit List

1. With the client's account displayed in the *Patient Clipboard**, right-click the patient's name in the *Patient list* area and select **Patient Visit List**.
2. Continue adding items or updating items as needed.
3. Click **OK** to save.

Viewing and Updating Multiple Patient Visit Lists

1. Click on the *Daily Planner* toolbar button.
2. Select the **View for all staff** check box and click on the *Patient Visit List* tab.
3. Click on headers to sort list by client or patient information; double-click any PVL on list to open.
4. Continue adding items or updating items as needed.
5. Click **OK** to save to return to the list of PVLs.

Viewing Prescriptions

1. With the client's account displayed in the *Patient Clipboard**, select the patient's name in the *Patient list* area.
2. Select the *Prescriptions* tab in the *Patient File* area.
3. Right-click the prescription and select **View**.
4. Click **Print**, **Preview**, or **Cancel**.

Renewing Prescriptions

1. With the client's account displayed in the *Patient Clipboard**, select the patient's name in the *Patient list* area.
2. Select the *Prescriptions* tab in the *Patient File* area.
3. Right-click the prescription that needs to be renewed and select **Renew**.
4. Modifications can be made to any of the available fields. (Unavailable fields are grayed out.)
5. Click **OK**.
6. Click **OK** to print.

Refilling Prescriptions

1. With the client's account displayed in the *Patient Clipboard**, select the patient's name in the *Patient list* area.
2. Select the *Prescriptions* tab in the *Patient File* area.
3. Right-click the prescription that needs to be renewed and select **Refill**.
4. Modifications can be made to any of the available fields. (Unavailable fields are grayed out.)
5. Click **OK**.
6. Click **OK** to print.

Correcting Prescriptions

1. With the client's account displayed in the *Patient Clipboard**, select the patient's name in the *Patient list* area.
2. Select the *Prescriptions* tab in the *Patient File* area.
3. Right-click the prescription that needs to be corrected and select **Correct**. The *Prescription Information - Renew* window displays.
4. Modifications can be made to any of the available fields. (Unavailable fields are grayed out.)
5. Click **OK**.
6. Click **OK** to print.

Voiding Prescriptions

1. With the client's account displayed in the *Patient Clipboard**, select the patient's name in the *Patient list* area.
2. Select the *Prescriptions* tab in the *Patient File* area.
3. Right-click the prescription that needs to be voided and select **Void**.
4. If applicable, click **Yes** at the *Do you want to void Prescription No. __?* message.

   Notice that the prescription has been automatically hidden in the Patient File.

Chapter Summary

You learned these important concepts within this chapter:

- **Patient Visit List** – Features, benefits and workflow of the *Patient Visit List*
- **Vaccinations & Rabies Certificates** – Complete the vaccination tag window and understand how the inventory setup and defaults can positively affect the efficiencies when the vaccine tag special action is set up or new vaccine or rabies inventory is used and entered on the fly to update the vaccine default information such as the manufacturer and producer.
- **Prescriptions** – Create a prescription for an inventoried pharmaceutical item.
- **Daily Planner Diagnostics** – View, schedule and complete call backs for lab results.
- **Other Procedural Steps**

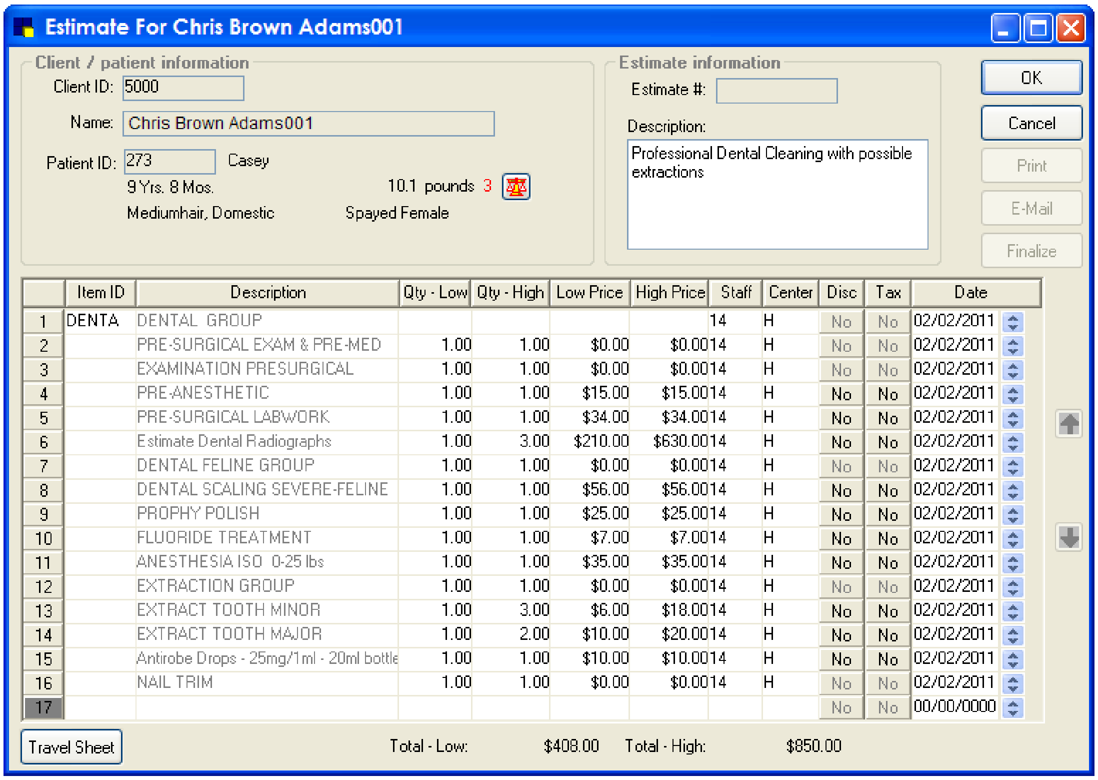
Chapter 4: Recommended Treatments & Costs

You'll learn these important concepts in this chapter:

- **Estimate** – Create and customize an estimate.
- **Payments / Deposits** – Record an estimate deposit payment to a client's account.
- **Pre-Admit Process** – Update the reason for visit.
- **Other Procedural Steps**

Estimate

A detailed estimate provides your client with a realistic idea of the range of expenses that may be incurred for a patient requiring hospitalized (inpatient) care/services.



	Item ID	Description	Qty - Low	Qty - High	Low Price	High Price	Staff	Center	Disc	Tax	Date
1	DENTA	DENTAL GROUP					14	H	No	No	02/02/2011
2		PRE-SURGICAL EXAM & PRE-MED	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
3		EXAMINATION PRESURGICAL	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
4		PRE-ANESTHETIC	1.00	1.00	$15.00	$15.00	14	H	No	No	02/02/2011
5		PRE-SURGICAL LABWORK	1.00	1.00	$34.00	$34.00	14	H	No	No	02/02/2011
6		Estimate Dental Radiographs	1.00	3.00	$210.00	$630.00	14	H	No	No	02/02/2011
7		DENTAL FELINE GROUP	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
8		DENTAL SCALING SEVERE-FELINE	1.00	1.00	$56.00	$56.00	14	H	No	No	02/02/2011
9		PROPHY POLISH	1.00	1.00	$25.00	$25.00	14	H	No	No	02/02/2011
10		FLUORIDE TREATMENT	1.00	1.00	$7.00	$7.00	14	H	No	No	02/02/2011
11		ANESTHESIA ISO 0-25 lbs	1.00	1.00	$35.00	$35.00	14	H	No	No	02/02/2011
12		EXTRACTION GROUP	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
13		EXTRACT TOOTH MINOR	1.00	3.00	$6.00	$18.00	14	H	No	No	02/02/2011
14		EXTRACT TOOTH MAJOR	1.00	2.00	$10.00	$20.00	14	H	No	No	02/02/2011
15		Antirobe Drops - 25mg/1ml - 20ml bottle	1.00	1.00	$10.00	$10.00	14	H	No	No	02/02/2011
16		NAIL TRIM	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
17									No	No	00/00/0000

Estimates are created from the *Estimate* window, which is divided into these areas:

<u>*Client / patient information* area</u>:

- *Client ID*: Contains client's ID
- *Name*: Displays client's name
- *Patient ID* field: Contains patient's ID

<u>*Estimate information* area</u>:

- *Estimate #*: Contains estimate number assigned by Cornerstone (existing estimates). Double-click or **F2** to search for/select an existing estimate in the *Estimate List*. This field is left blank when creating new estimates since estimate numbers are assigned automatically by Cornerstone when the estimate is saved.
- *Description*: Enter text describing the purpose for the estimate.

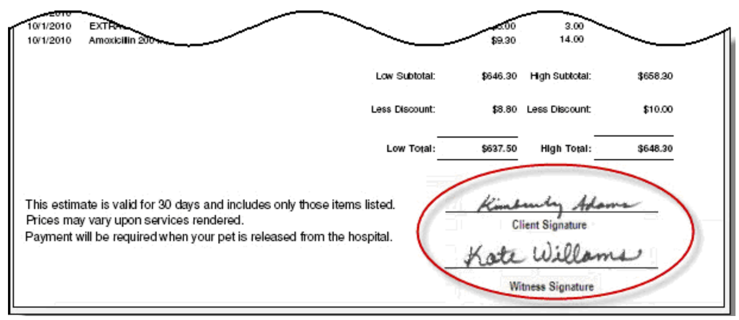
<u>The *Estimate* window buttons include:</u>

- **Up/Down arrow**: Move a selected invoice item up/down in the list.
- **Travel Sheet**: Access the *Travel Sheet* selection window.
- **OK**: Save the estimate.
- **Cancel**: Exit the *Estimate* window without saving.
- **Print**: Print/reprint an existing estimate.
- **E-mail**: E-mail an existing (not new) estimate.
- **Finalize**: Finalize an existing tentative estimate.

Invoice item list grid:

- *Item ID*: Contains the invoice item's ID number.
- *Description*: Contains the invoice item's description.
- *Qty - Low*/*Qty - High*: Enter numbers to set the low/high quantities for the invoice item.
- *Low Price*/*High Price*: Enter values for the low/high prices for the invoice item.
- *Staff*: List the staff member's ID to be associated with the invoice item.
- *Center*: Contains the revenue center's ID.
- *Disc*: Select the **No**/**Yes** button (as applicable) to not apply/apply a discount to the invoice item.
- *Tax*: Select the **No**/**Yes** button (as applicable) to not apply/apply a tax to the invoice item.
- *Date*: Date the invoice item was added to the estimate.

Electronic Estimate Signatures



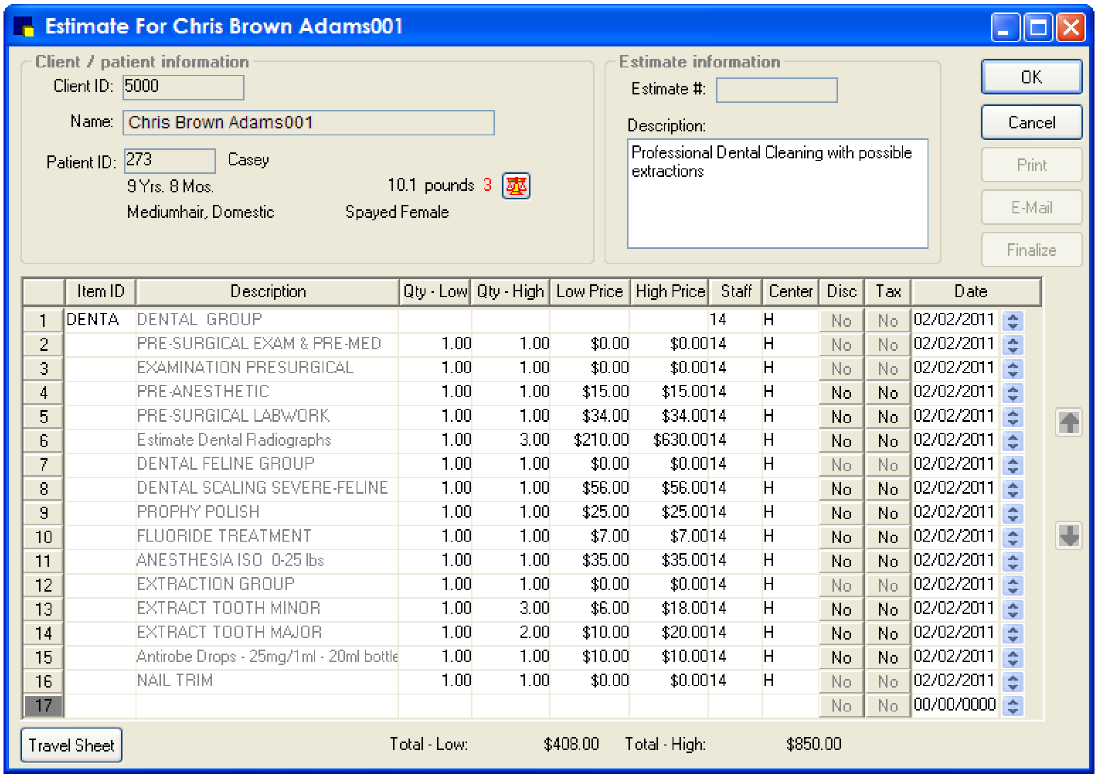
Cornerstone allows clients to view an on-screen estimate and electronically sign the estimate using a supported signature capture device or tablet PC. Signed estimates are automatically finalized and saved to patient history. On the *Patient Clipboard* and estimate-related windows throughout Cornerstone, the Signature  icon displays next to estimates that have been electronically signed.

Creating a New Estimate

TRAINER-LED DEMONSTRATION

1. With a client displayed in the *Patient Clipboard*, right-click a patient in the *Patient list* and select **Estimate**. **[use your demonstration client and Casey]**
2. **Tab** past the *Estimate #* field. **[Tab]**
3. Enter a *Description* for the estimate. **[see estimate image for description]**
4. **Tab** to the first *Item ID* field.

5. Use the *Item ID* fields to add the appropriate items to the estimate and enter/edit the detail fields for those items. **[Add items to Casey's dental estimate and edit the item details to produce the estimate as shown in the estimate image.]**



Estimate For Chris Brown Adams001

Client / patient information

Client ID: 5000

Name: Chris Brown Adams001

Patient ID: 273 Casey

9 Yrs. 8 Mos. 10.1 pounds 3

Mediumhair, Domestic Spayed Female

Estimate information

Estimate #:

Description: Professional Dental Cleaning with possible extractions

OK

Cancel

Print

E-Mail

Finalize

	Item ID	Description	Qty - Low	Qty - High	Low Price	High Price	Staff	Center	Disc	Tax	Date
1	DENTA	DENTAL GROUP					14	H	No	No	02/02/2011
2		PRE-SURGICAL EXAM & PRE-MED	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
3		EXAMINATION PRESURGICAL	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
4		PRE-ANESTHETIC	1.00	1.00	$15.00	$15.00	14	H	No	No	02/02/2011
5		PRE-SURGICAL LABWORK	1.00	1.00	$34.00	$34.00	14	H	No	No	02/02/2011
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12		EXTRACTION GROUP	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
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16		NAIL TRIM	1.00	1.00	$0.00	$0.00	14	H	No	No	02/02/2011
17									No	No	00/00/0000

Travel Sheet Total - Low: $408.00 Total - High: $850.00

6. Click **OK** to save when the information is complete. **[click OK]**
7. In the *Save Estimate* window:
   - Edit the number of days the estimate remains in the system until being closed by the End of Day.
   - Select the **Finalize** check box to finalize the estimate.
   - Select the **Print** or **E-mail** check box.
   - Select the number of copies to print; and alter the message that prints on the estimate.
8. Click **Options** to change the transfer and print options. You must have appropriate security to access the options.
   - Selections in the *Transfer to patient visit list* area determine the prices that transfer.
   - Selections in the *Print prices* area determine the prices that will print on the estimate.
   - Selections in the *Print* area determine whether the prices will print the detailed item lines and as a final total, or only as a final total.

Payments / Deposits

Recording a deposit (payment) may be a normal part of your responsibilities. This lesson guides you through recording those deposits in a client's account. Client accounts are clearly marked to reflect balances due, credit balances, transactions and payments.

TRAINER-LED DEMONSTRATION

Record a deposit for your Casey's balance by taking a payment for 100% of the senior wellness and 50% of the dental cleaning estimate for your Casey patient using your assigned Cashier password.

1. From the *Patient Clipboard*, access the client's record. **[your demonstration client]**
2. Click on the *Estimate* tab to collect the amount for the Senior Wellness and Dental estimates. You will need this information for Step #6. **[*Estimate* tab > gather amounts]**
3. Select the *Account Information* tab and right-click in the work area. **[on the *Account Information* tab, right-click in the work area]**
4. Select **Payment**. **[Payment]**
5. From the *Payment for (your demonstration client's name)* window, enter the *Cashier Password*. **[enter your assigned cashier password]**
6. Enter the payment information. **[client pays 100% of senior wellness visit and 50% of dental cleaning estimate. Payment details: today's date, check # 2001 for half the amount, and cash for the remaining half.]**
7. Click **Post**. [**Post]**
8. At the *Print* question, answer **Yes** or **No**. **[No]**

Pre-Admit Process

Updating the information for checked-in patients throughout the patient's visit helps keep your team current with patient cases. Doctors and technicians routinely use the *Check-in Report* to provide information relating to the visit, the patient's history and the client's account. You can update a checked-in patient, using the *Appointment Scheduler*, *Census List* or *Patient Clipboard*.

TRAINER-LED DEMONSTRATION

Update Casey's check-in information through the Patient Clipboard > Check-In tab so the Census List reads Dental and the patient appears on the main Whiteboard window without patient orders.

1. From the *Patient Clipboard* with the client displayed and the patient selected, click the *Check-in* tab. **[click the *Check-in* tab for your demonstration client's Casey]**
2. Right-click on the *Check-in* tab's work area and select **Update**. **[right-click and select Update]**
3. Verify that the *Staff ID* is correct or select another *Staff ID*. **[C. Schulze, DVM]**
4. Verify that the Client and Patient IDs are correct. **[your demonstration client and Casey]**
5. Verify that the *Reason for visit* is correct. Select another *Reason for visit* if needed. **[Dental]**
6. Verify that the *Room* is correct. Select another *Room* if needed. **[C. Schulze, DVM (or use Overflow column if needed)]**
7. Optional: Select a *Ward*.
8. Optional: Enter a *Cage* name if needed.
9. Select a *Status*. **[<None>]**
10. If this is a referral recheck, select the **Referral Recheck** check box.
11. Make a selection for **Inpatient** or **Outpatient**. **[Inpatient]**

12. Optional: Enter any *Additional notes* or *Alert notes*. **[If this additional note is not already listed, please add it: Ms. Adams thinks Casey is staying for a dental cleaning.]**
13. Optional: Linked documents display in the **Documents** area. Select *Documents* to print with the *Check-In Report*. **[list document ID 378 for the Sample Surgery Consent]**
14. Optional: In the *Weight entry* area, enter the patient's *Weight*. **[10.0]**
15. Optional: *Check-in Date* and *Time* can be changed if needed.
16. Optional: Click the **Travel Sheet** button to print a travel sheet with this client/patient information.
17. Click **Update**. **[Update]**
18. After clicking **Check-in**, if the *Vital Signs* window displays, enter vital sign information as needed. Then **Close** the *Vital Signs* window.
19. If prompted, enter a document Staff ID. **[C. Schulze, DVM]**
20. If a document displays, make additions/changes as needed. When set up to do so, documents can include client signatures which may be added using an approved signature capture device. **[Select the `Do' check box; during this demonstration we will not be adding a client signature.]**
    - 20.1 Click **Close** to save the changes and close the document. **[Close]**
    - 20.2 Select the appropriate print options. **[View the document.]**
21. Click **Yes** or **No** to print the *Check-In Report*. **[do not print]**

Other Procedural Steps R

This lesson includes additional information about estimate features in Cornerstone.

Updating Tentative Estimates

1. With the client's account displayed in the *Patient Clipboard**, select the patient in the *Patient list* area.
2. In the *Patient information* area, select the *Estimate* tab.
3. Double-click on the estimate to be updated.
4. Press **Tab** at the *Estimate #* field and the estimate information displays.
5. Update the necessary information on the estimate.
6. Click **OK** to save changes.

Creating Additional Estimates

1. From the client's account in the *Patient Clipboard**, right-click the patient in the *Patient list* area.
2. Select **Estimate**.
3. Add a description to the estimate.
4. Add invoice items to the estimate.
5. Click **OK** to save the estimate.
6. In the *Save Estimate* window, select the appropriate options.
7. Click **Options** to change the transfer and print options.
8. Click **OK** to save the estimate with the new selections.

Selecting Multiple Estimate Messages

1. Create the estimate. After clicking **OK** to save the estimate, the *Save Estimate* window displays.
2. Click **Messages**.
3. Enter the ID of the first message. Press **F2** to select from a list of your practice's messages.
4. If needed, click the **Note** button to make changes or add information to the message text.
5. Add additional messages as needed. Click the arrow buttons at the bottom of the dialog box to change the order in which the messages display.
6. Select the **Print estimate messages on a separate page** check box if you want to print the messages on a different page than the estimate.
7. Click **OK** to return to the *Save Estimate* window. Continue with your normal processing. Emailing Estimates

Emailing Estimates

To email estimates, you must have Microsoft* Outlook* or Microsoft Outlook Express installed on your workstation and set as the default email program, you must also have access to the Internet and a valid email account.

1. With your email program open, open the estimate to be Emailed.
2. Press **Tab** to view the items for this estimate.
3. Click **Email**.
4. Click **Email** to continue or change the estimate message and then click **Email**.
5. The subject is automatically entered.
6. Type any notes, if necessary.
7. The client field will be available if the client to whom you are sending the email has an email address listed in his/her client information. Select Client option for **To** (or an appropriate option in the *Send to* area.
8. The email address on file will be used to send this email although the address will not be displayed.
9. Click **OK** to send the email.

Finalizing Estimates

1. With the client's account displayed in the *Patient Clipboard*, select the patient in the *Patient list* area.
2. In the *Patient information* area, select the *Estimate* tab.
3. Double-click the desired Estimate #.
4. In the *Estimate* window, press **Tab** to view the estimate.
5. Click **Finalize**.
6. In the *Save Estimate* window, make any necessary changes.

Electronically Signing an Estimate

Depending on your practice default settings, you can capture a client signature as well as a witness signature using an approved signature capture device.

1. With the estimate details listed, from the *Save Estimate* window, select **Preview/Signature**.
2. Review the on-screen estimate with the client, then click **Signature**.
   - 2.1 If using a connected signature capture device, a signature box displays. Ask the client to sign in the box, then click **OK** to insert the signature into the estimate.
   - 2.2 If using a Tablet PC, sign directly on the Authorized Signature line.
   - 2.3 To add a Witness Signature, repeat the client signature steps.
3. Once estimate is signed, it is automatically finalized and saved to patient history.
4. Signed estimates display on the Estimate tabs of the *Patient Clipboard*. A signature icon displays adjacent to the estimate description.

Checking out Patients using the Census List

1. Press **F3** to access the *Census List*.
2. Select the client.
3. Click **Check-out**.
4. Click **Yes** to confirm the check out.
5. Click **OK**.

Using Travel Sheets

1. In an estimate, *Patient Visit List*, or invoice, click the **Travel Sheet** button.
2. Select a travel sheet.
3. Minimize the selection list or view a specific classification of items, or for speed in invoicing, by clicking the classification name in the left column.
4. To select an item, click it. The quantity will change to 1. Click again to add to the quantity; right-click to reduce the quantity. You can select one or multiple items from one or more travel sheets.
5. When all items have been selected, click **Transfer** to send the items to the estimate, *Patient Visit List*, Patient orders or invoice.
6. Enter a Staff ID in the *Enter Staff ID* window and click **OK**.

Chapter Summary

You learned these important concepts in this chapter:

- **Estimate** – Create and customize an estimate.
- **Payments / Deposits** – Record an estimate deposit payment to a client's account.
- **Pre-Admit Process** – Update the reason for visit.
- **Other Procedural Steps**

Chapter 5: Admit & Pre Procedures

You'll learn these important concepts within this chapter:

- **Cornerstone Electronic Whiteboard** – Whiteboard features and benefits, the basic Whiteboard workflow, how the Whiteboard fits into the equation of automating charges and Whiteboard Smart Groups that make the Whiteboard easy to use.
- **Patient Orders & Whiteboard Patient Visit List** – Enter Patient Orders by adding invoice items and Smart Groups, transfer charges from the *Whiteboard Patient Visit List*, and learn how to include in your process the start of a procedure medical note.

Cornerstone Electronic Whiteboard

View a snippet online demonstration

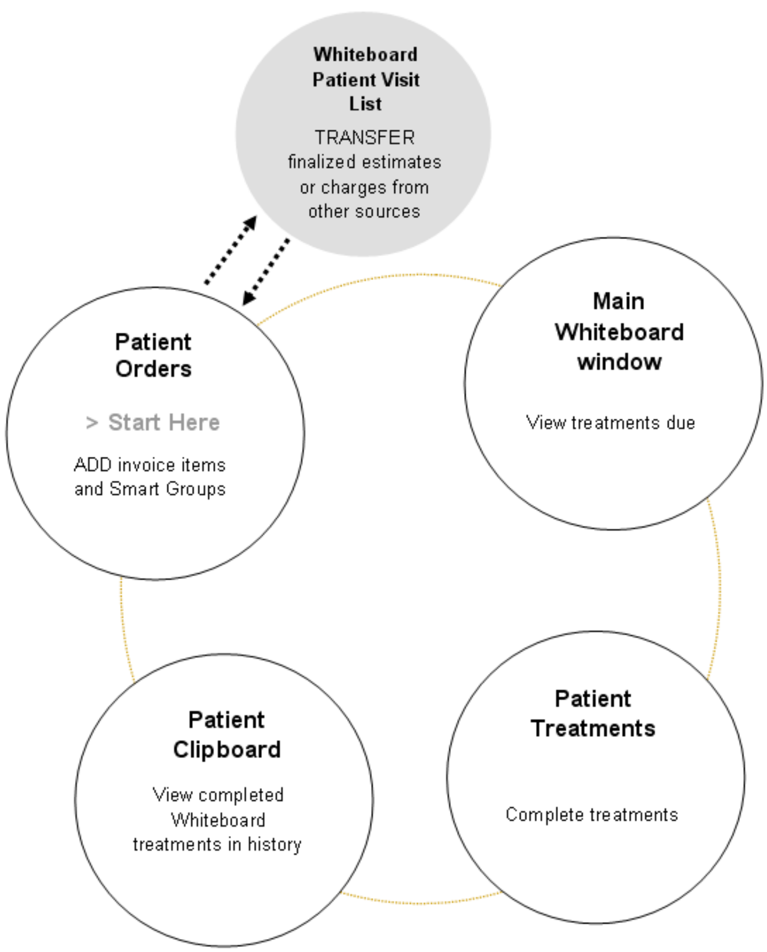
During this lesson, you'll learn about Whiteboard features and benefits, the basic Whiteboard workflow, how the Whiteboard fits into the equation of managing charges, best practices in handling billing charges from the Whiteboard, and be introduced to Smart Groups that make the Whiteboard easy to use.

The Cornerstone Electronic Whiteboard is an advanced version of the common dry erase whiteboard that practices use in their treatment area. Practices who successfully integrate the Whiteboard into their practice find it to be:

- A quick way to prescribe a treatment or follow a treatment protocol
- A highly-visible, easy way for staff to track and record patient care
- An improved method to automate billing and capture charges based on provided care
- Record detailed care information into the medical record

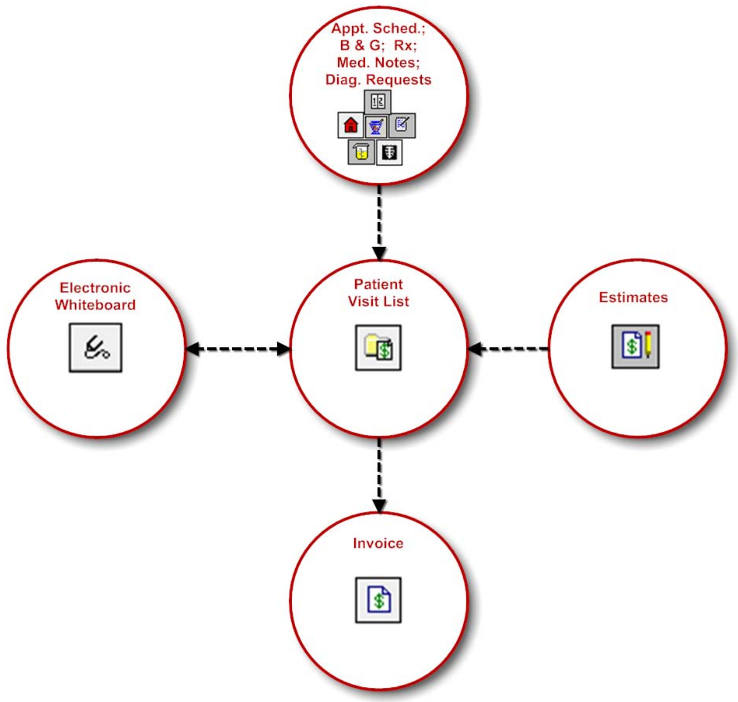
Whiteboard Workflow Overview

The Cornerstone Whiteboard workflow (see image below) works in this manner: Add invoice items and Smart Groups on the Patient Orders window, possibly transferring in treatments from finalized estimates or other sources found on a Whiteboard Patient Visit List, then back to the Patient Orders window to complete the details. After initial orders are entered, staff monitor the main Whiteboard hourly grid to identify when treatments are to be completed, then double-clicking to reach the Patient Treatments window to complete the treatment and record any detail care information. The end result is the recorded detailed care information with staff, time.



Automating Charges

Before we get started in the *Patient Orders* window, it's important to understand how the Whiteboard fits into the equation of automating and capturing charges. When you select quantities, billing and frequencies on the *Patient Orders* window, that will affect the charges that flow to the *Patient Visit List*. Referring to the illustration below, charges will be entered as you complete treatments and you'll manage the billing of those final charges on the *Patient Visit List*, along with other charge types. Notice the way that the black arrows flow, some flow in one direction and some are bi-directional.



Whiteboard Groups

The quickest way to use the Whiteboard is to designate certain Whiteboard Groups to be used within this powerful feature. This makes the patient order entry process quick and easy. Below is an introduction to two Whiteboard Groups we'll enter on the *Patient Orders* window: Outpatient Whiteboard and Hospitalized Whiteboard.

Hospitalized Whiteboard Group (HWG)	OutPatient Whiteboard Group (OWG)
Administer Medication	Administer Medication
Blood Draw	Blood Draw
Call Client	Call Client
Check Appetite	Water
Check Bandage	Clean Cage / Change Litter
Check Stool	Remove Catheter
Check for Vomiting	Vital Signs
Check Incision	Observations
Feed	Procedure
Feed (Owner Food)	
Monitor Appetite & Drinking	
Monitor Urination	
Vital Signs	
Walk	
Water	
Clean Cage/Change Litter	
Procedure (A write in for the main procedure)	

Patient Orders & Whiteboard Patient Visit List M

View a snippet online demonstration

During this lesson, you'll learn how to complete the *Patient Orders* window and transfer charges from the *Whiteboard Patient Visit List*.

Some refer to the *Patient Orders* window as an extension of the *Patient Visit List*. Best practice is to access *Patient Orders* from the *Patient Clipboard* so that you ensure you are selecting the right patient. If you select the wrong patient, you'll have a lot of extra work to correct the problem. Let's walk through the steps, windows and fields.

If your practice has SmartLink Digital Imaging, you may want to create your request prior to the *Patient Orders* window for pre procedure images.

TRAINER-LED DEMONSTRATION

Casey will be admitted to the hospital and Whiteboard for her dental procedure. Add the Whiteboard Smart Group, click the Patient Visit List button to transfer most of the Dental Procedure finalized estimate, then back to the Patient Orders window to complete order details before Casey's treatments are viewable on the main Whiteboard window.

1. From the Cornerstone toolbar, click the **Patient Clipboard** toolbar button. **[click Patient Clipboard]**
2. Enter or search for the *Client ID*. **[your demonstration client]**
3. Select and right-click your patient**. [your Casey]**
4. Select **Electronic Whiteboard** > **Patient Orders**. **[Electronic Whiteboard > Patient Orders]**

Continued...

Patient Orders – Header

This table explains the key header information and how to best use the fields.

Cage	Free-form field where practice usually enters a cage number. As an alternative, enter a short word for the procedure and optional alert information. Note: Alerts do appear when you complete the treatments but if you are viewing the main Whiteboard screen to see who is due, you won't see the alerts unless you actively click on the patient. This is later viewable on the *Census List*.
Ward	Practices usually use wards like Radiology, Bath, Groom, Surgery, Lab Work. This is later viewable on the *Census List*.
Admit	Defaults to today's date
Discharge	Cornerstone system automatically defaults to 3 days greater than the admit date and future Whiteboard charge calculations are based on this date.
Supervising Dr	Enter the doctor and later use on the main Whiteboard window for filtering.
Current Care Dr	Enter the doctor currently providing care for the patient. Can be used for filtering data.
Status	Defaults to 'Inpatient', which results in the patient appearing on the Whiteboard. Patients with **Inpatient** Status may not be changed back to **Outpatient** Status without first processing (posting) their invoice.

5. Enter the *Cage* information. **[Dental; BITER]**
6. Select the *Ward*. **[Surgery]**
7. Optional: Accept or modify the *Admit Date* and the *Admit Time*. **[change to tomorrow's date]**
8. Enter the *Supervising Dr.* **[C. Schulze, DVM]**
9. Enter the *Current Care Dr.* **[C. Schulze, DVM]**

Continued...

Patient Orders – Body

Enter your invoice items and groups with the information from the table below in mind. Note: If a group has been added to the Patient Orders previously, the columns will default in with information "memorized" from the last time that the invoice item or group was used.

Quantity	Enter the quantity
Billing	Billing choices affect the number of times an item is added to the Patient Visit List
Category	Category selection affects how the treatment line displays on the Whiteboard
Frequency	Frequency choices trigger the codes you see in the hourly grid. Examples: UC, Scheduled, Cont, Overdue
Note	Optional – Your practice may find a unique need
PRN	Select for treatments as needed. Use in addition to frequency. Treatments will not list as overdue.

Dose Now	For treatments to be performed NOW, then follow regularly scheduled frequency. Used in addition to frequency.
Start & Duration	Affects initial start and how long you'll see the treatment on the Whiteboard. Used in addition to frequency. Can set specific duration in days/hours for treatments. Often used in conjunction with the 'continuous' frequency.
Blue Line	Use the blue line to enter such information as fluid type and fluid rates. The information entered on the blue line will be saved to the patient's electronic medical record when your staff completes the treatment.

10. **[Use the information in the Patient Orders image to enter Invoice items and the order information into Patient Orders. [Enter items as pictured. In Invoice Item ID OWG, Outpatient Whiteboard Group; Delete all except 1. Call Client (CALL), 2. Remove Catheter (RC), 3. Vital Signs (VITALS), and 4. Procedure (PROC); Change Description of Procedure to 'Dental']**

	Item ID	Item Description	Quantity	Billing	Category	Frequency	Note		PRN	Dose Now
1	OWB	Outpatient Whiteboard Grou						☐	☐	☐
2	CALL	Call Client (Whiteboard)	1.00	No billing or i	Communication	SID PM	Not required	☐	☐	☐
3	RC	Remove Catheter (Whiteboa	1.00	No billing or i	Treatments	One time	Not required	☐	☐	☐
4	VITALS	Vital Signs	1.00	No billing or i	Vital Signs	TID 3x per day	Not required	☑	☐	☐
5	PROC	DENTAL	1.00	No billing or i	Treatments	One time	Not required	☐	☐	☐
6	4155	PRE-SURGICAL LABWORK	1.00	1 line each ti	Diagnostics	Until Completec	Not required	☐	☐	☐
7	5005	ANESTHESIA ISO 0-25 lbs	1.00	1 line each ti	Treatments	One time	Not required	☐	☐	☐
8	EXTRACT	EXTRACTION GROUP						☐	☐	☐
9	7505	EXTRACT TOOTH MINOR	3.00	1 line each ti	Treatments	One time	Not required	☐	☐	☐
10	7510	EXTRACT TOOTH MAJOR	2.00	1 line each ti	Treatments	One time	Not required	☐	☐	☐
11	02375	Antirobe Drops - 25mg/1ml -	1.00	No billing or i	Medications	BID 2x per day	Not required	☐	☐	☐
	Take from filled patient meds									
12	2600	NAIL TRIM	1.00	1 line each ti	Treatments	One time	Not required	☐	☐	☐

Continued...

Prescriptions

There are two ways to handle items with dispensing fees on the Whiteboard.

If	Then
You need to dose from a prescribed bottle	Create a prescription label for the medication from the *Patient Clipboard* or *Patient Visit List* OR enter the medication in the *Patient Orders* to be completed one time. This will bill the medication and create the prescription label (if the prescription label special action is being used) when your staff completes the treatment. Then to give the medication enter an order for a non-billable service with a note on the blue line to denote how much medication. Set the frequency to how often the medication should be given.
You need to dose medication as needed from a common vial	Enter the medication in the *Patient Orders* to be administered with the appropriate frequency. Dispensing items should also be created and attached to the appropriate inventory items to ensure your full dispensing fee will not be charged each time you administer the medication. Dispensing items allow the staff a choice on the dispensing fee that will be added to the medication price. Dispensing Item Examples: Meds To Go Home, Meds Admin In Hospital, etc.

PVL Button

Click the PVL button to transfer items into the *Patient Orders* screen from the *Whiteboard Patient Visit List*.

11. Click the **PVL** button. **[PVL]**
12. View items to transfer to *Patient Orders*, including scrolling up to see the entire list. **[Scroll up]**
13. In the *Ord* column, select the check boxes for the items you want to move from the items on the PVL, (that were transferred from the finalized estimate), to the patient orders. **[select Pre-Surgical Labwork, Anesthesia, Extraction Group, Extract Tooth Minor, Extract Tooth Major, Antirobe, Nail Trim; Use the details included in the Patient Orders image to fill out the columns and blue lines]**
14. Click **Order**. **[Order]**
15. Click **OK** again to exit the *Patient Orders* window. **[OK]**

From the *Patient Orders* window, once you click **OK**, patient orders cannot be deleted but they can be discontinued.

Medical Note Document

At this time, the medical team may start the surgery document (medical note).

Start the Dental (Feline) – Medical Note and Client Report for Casey. The Weight Vital window will not appear because the weight was entered during the exam. The first two pages of the medical note are for the internal medical record and the last page is a client report of the dental procedure.

1. From the Cornerstone toolbar, click the **Patient Clipboard** toolbar button. **[**  **]**
2. Enter or search for the *Client ID*. **[your demonstration client]**
3. Select and right-click on the patient's name**. [your Casey]**
4. Select **Medical Note** from the right-click menu. **[Medical Note]**
5. Enter the *Staff ID* on the *Start New Document* window. **[C. Schulze, DVM]**
6. Enter the title or key word to find the desired template. **[dental]**
7. Select the document in the results and click **OK**. **[Click OK to select the Dental (Feline) – Medical Note and Client Report.]**

8. Enter applicable data and insert other elements. Click the Lock/Unlock toolbar button and determine if locking would make your data entry quicker. **[Review the main sections, try out the elements, and on page 3 of the table, insert a "before" dental picture. To insert the image: left-click once in the table under 'Before Dental'. From the Cornerstone Editor's menu bar, click the Insert button and select Picture. Navigate to Cstone's Images folder and select this image file: 274-20091218153724609-1_original.jpg.]**
9. Click **OK**. **[click OK and close any open windows until you are at the main Cornerstone window]**

Chapter Summary

You learned these important concepts within this chapter:

- **Cornerstone Electronic Whiteboard** – Whiteboard features and benefits, the basic Whiteboard workflow, how the Whiteboard fits into the equation of automating charges and Whiteboard Smart Groups that make the Whiteboard easy to use.
- **Patient Orders & Whiteboard Patient Visit List** – Enter Patient Orders by adding invoice items and Smart Groups, transfer charges from the Whiteboard Patient Visit List, and learn how to include in your process the start of a procedure medical note.

Chapter 6: Procedures

You'll learn these important concepts within this chapter:

- **Patient Treatments** – View and navigate the main Whiteboard window, perform other tasks such as update patient orders and view a Patient Treatment Report, view detailed patient treatment information, enter vital signs and complete treatments, discontinue treatments and remove from the Whiteboard.
- **Procedure Medical Notes** – From the Daily Planner access the medical note to complete.

PATIENT TREATMENTS [M]

View a snippet online demonstration

Remembering that the Whiteboard is a highly-visible and easy way for staff to view, track and record patient care, you'll learn how to view from the main Whiteboard, record the completion of patient treatments, even several treatments at once.

At this point these are the tasks the medical team will need to be able to do:

1. View & Navigate - Main Whiteboard Window
2. Other Tasks Options– Update Patient Orders & View Patient Treatment Report
3. View Detailed Patient Treatment Information, Enter Vital Signs & Complete Treatments
4. Discontinue Treatments & Remove from Whiteboard

TRAINER-LED DEMONSTRATION

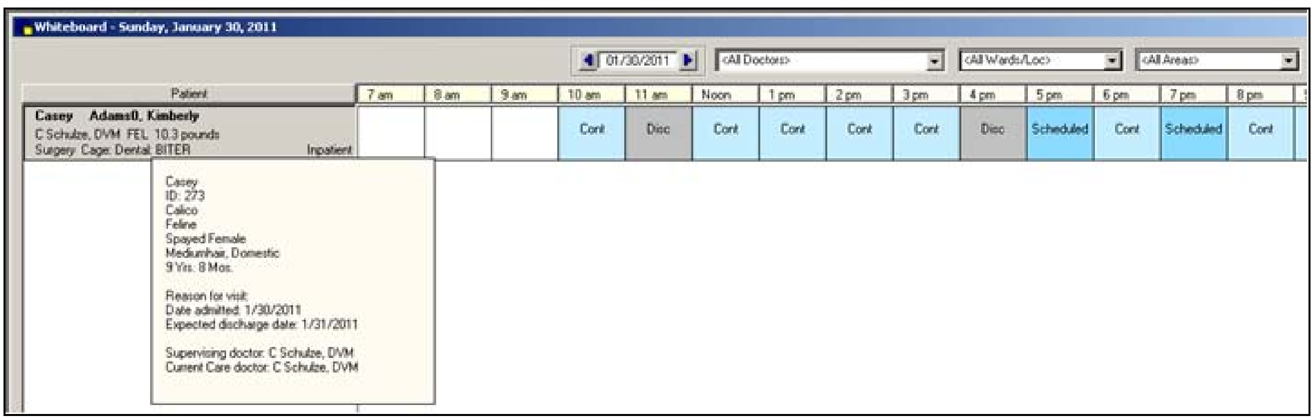
Navigate to the main Whiteboard window, view and navigate Casey's information, right-click to change Casey's patient orders for Call Client & view patient treatment report and view specific treatments on the Patient Treatments window.

1. Starting with a blank Cornerstone window, click the **Whiteboard** toolbar button.

Continued...

View & Navigate - Main Whiteboard Window

Use the main Whiteboard window to view the entire Whiteboard patient list. The number of patients you can view depends on the orientation of the monitor and whether or not you are using a normal workstation monitor or a large Whiteboard monitor. The main Whiteboard listing displays in patient alphabetical order.



- ❒ Learn to hover over the Patient area to see the Patient Information box.
- ❒ Learn to use the date filter to navigate to the previous day and next day's treatments to ensure patient orders are correct.
- ❒ Learn to select doctors, wards, and areas filter.
  Doctors filter – shows number of doctor procedures
  Wards filter – shows number of patients in isolation area
  Areas filter – shows number of labs technicians needs to complete

❒ Learn the treatment due codes and colors.

Treatment Code	Color
Scheduled	Bright Blue
Continuous	Light Blue
Completed	Green
Overdue	Red
Disc (Discontinued) and DNP (Did Not Perform)	Gray

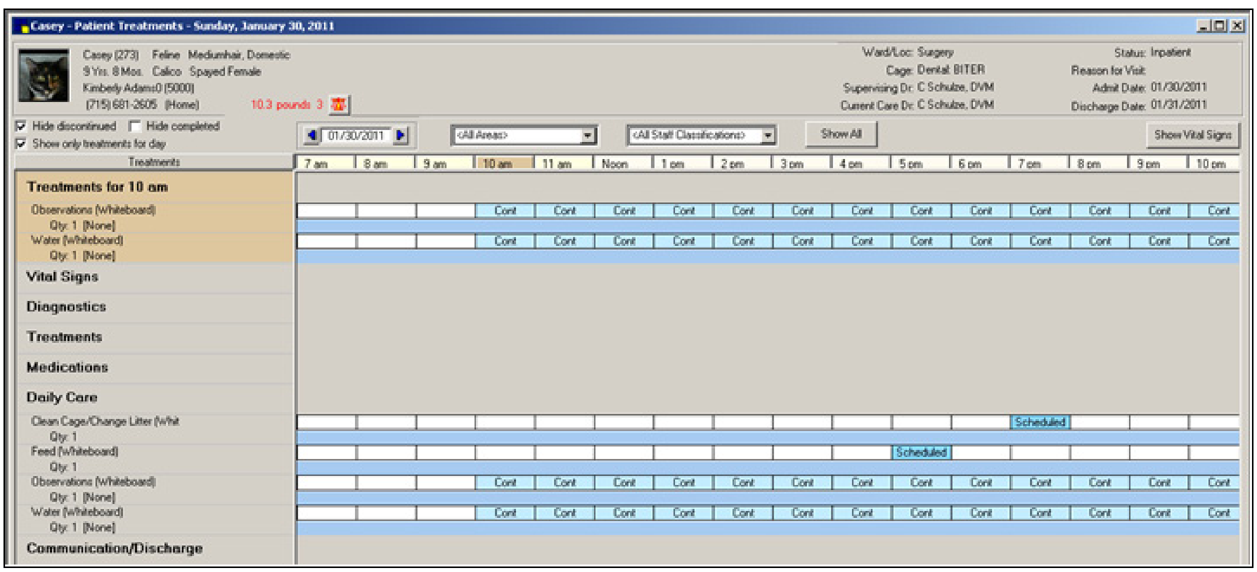
Other Tasks Options – Update Patient Orders & View Patient Treatment Report

Select Casey to change the 'Call Client' time to 3pm, then preview the Patient Treatment Report.

2. Right-click patient and select **Patient Orders**. **[your Casey]**
3. Update Patient Orders and click **OK**. **[Change 'Call Client' invoice item to time of 3pm.]**
4. Right-click patient and select **View/Print Selected Day**. **[your Casey]**
5. Make *Whiteboard Reports* window selections and click **Preview**. **[Leave the window selections as is, Preview, and then exit report.]**

Continued...

View Detailed Patient Treatment Information, Enter Vital Signs & Complete Treatments



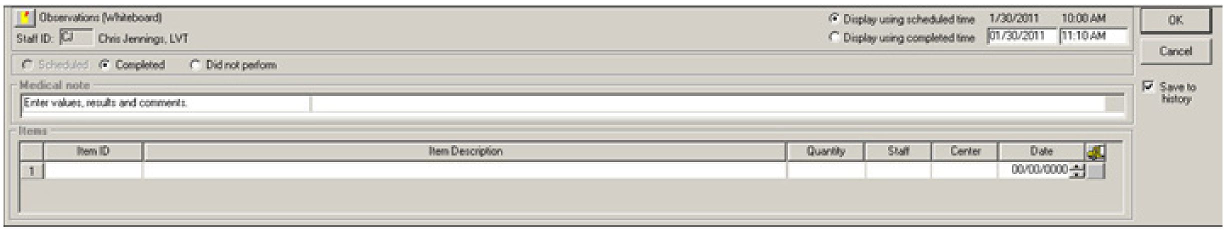
After your Patient Orders or treatments are entered, the medical team will be able to view treatments due. The completion and entry of completed treatments might occur in the following ways:

- Your technicians may print a *Patient Treatment Report* from Cornerstone (attach to each cage) or you may use your own treatment sheets, complete the treatments, then go to a workstation and mark as completed all at once.
- At a high technology level, your technicians may carry a tablet PC during treatments and complete in Cornerstone real-time.

6. Double-click the patient to view *Patient Treatments*. **[Double-click your Casey patient.]**

7. Right-click patient, select **Vital Signs**, enter vital signs and click **OK**. **[Select your Casey and enter applicable vital signs.]**
8. Complete single treatments. **[Double-click Observations and enter appropriate completion information.]**
9. Complete multiple treatments at once by using **SHIFT** + **CLICK** or **CTRL** + **CLICK** to select treatments listed together or non-consecutive treatments, right-click and select **Process Selected Treatments**. **[Highlight multiple treatments, right-click, Process selected treatments and enter completed information.]**

Continued...



Discontinue Treatments & Remove from Whiteboard

View a snippet online demonstration

Occasionally you may have a treatment that is no longer valid. The reasons might be either the doctor has received lab results and will take a different course of action, the treatment wasn't needed, or the treatment was accidentally entered on the *Patient Orders* window.

Moreover, you may want to discontinue one treatment or need to discontinue all treatments so you can remove the patient from the Whiteboard. We will discontinue one treatment in the next steps.

10. Right-click patient and select **Patient Orders**. **[Select your Casey patient.]**
11. Click anywhere on a treatment line, select **Discontinue Treatment**. Repeat if necessary then click **OK**. **[Select treatment line, 'Extract Tooth Major' and choose Discontinue treatment option.]**

Change Patient Status

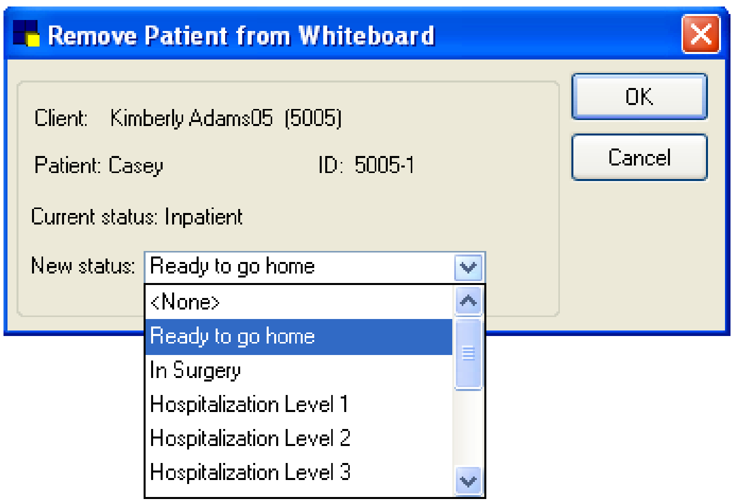
When the status of the patient is updated throughout the patient's visit, staff is more informed and can easily access details about the patient's visit. Often times, clients call to check on their pets and your staff will have information readily available to provide.

TRAINER-LED EXPLANATION

Change Casey's status from 'Inpatient' to 'Ready to go home'.

1. From the Whiteboard, with the client and patient record displayed, right-click on the patient's name and select **Remove from Whiteboard**. **[Right-click on your Casey, select Remove from Whiteboard.]**
2. From the *Patient Orders* window, click the **Remove from Whiteboard** button. **[Remove from Whiteboard]**
3. Change the patient's status to 'Ready to go home". **[Ready to go home]**
4. Click **Update**. **[Update]**
5. When prompted to print, make a selection. **[Do not print.]**
6. View the patient's status from the *Patient Treatments* window. **[From Patient Treatments window, view Ready to go home status.]**
7. The *Census List* is another location that displays the patient's status.

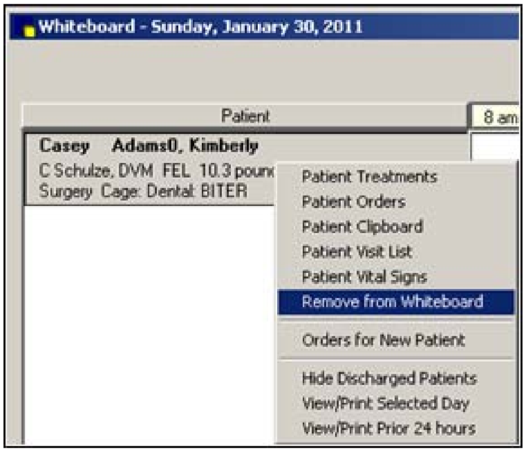
Trainee Note: Based on your practice's default settings, patients with **Ready to go home** status will display on the *Whiteboard* as **Discharged**.



TRAINER-LED EXPLANATION M

Now you can use the **Hide discontinued** and/or the **Hide completed** check boxes to hide the discontinued treatments on the Patient Treatments window.

If applicable, now you can remove the patient from the Whiteboard.



Procedure Medical Notes

Using the *Daily Planner*, the doctor and technician can access the medical notes they started and completed and optionally prepare a client procedure report.

TRAINER-LED DEMONSTRATION

Navigate to the Daily Planner and find the tentative Dental (Feline) – Medical Note and Client Report to complete.

1. Click the **Daily Planner** toolbar button.
2. Enter your staff ID to view your *Daily Planner* items, or to-do list. **[C. Schulze, DVM]**
3. Click the *Medical Notes* tab.
4. Double-click the medical note to complete, enter remaining information, then **Finalize**. **[Follow the trainer instructions for completion, which may include the following notations:**
   - **Extracted 107**
   - **Gingivitis class = 2**
   - **Plaque Class = 2**
   - **Calculus class=2**
   - **Occlusions = 0**
   - **Osseous Recessions on teeth 101, 201, 307, 308**
   - **Resorptive Lesions 107**
   - **Calculus 107, 108, 207, 208, 104, 204, 304, 404**
   - **Mobile Tooth 107**
   - **Periodontal Pockets 107]**

Chapter Summary

You learned these important concepts within this chapter:

- **Patient Treatments** – View and navigate the main Whiteboard window, perform other tasks such as update patient orders and view a Patient Treatment Report, view detailed patient treatment information, enter vital signs and complete treatments, discontinue treatments and remove from the Whiteboard.
- **Procedure Medical Notes** – From the Daily Planner access the medical note to complete.

Chapter 7: Post Procedures

You'll learn these important concepts within this chapter:

- **Update Documents** – Attaching documents and updating other important medical records and sample Cornerstone documents that the medical team may use post-procedure.
- **Take Home Prescriptions** – Navigate to the prescription window through the Patient Clipboard.

Update Documents

After a procedure, your medical team will need to prepare or update medical records and client documents so that:

- drop-offs are ready for pick-up by mid-day
- hospitalization, boarding care and treatments are continued to be documented
- client discharge instructions are prepared

Use the following Cornerstone templates and ideas to accomplish these tasks at a high level of efficiency and patient care. This will prevent documents from being misplaced and ensure legible records are accessible to the entire team:

- Sample Treatment Sheet
- Sample Boarding Activity Sheet
- Customize a Cornerstone procedure document so the first pages are the internal medical note and the last page is a client procedure report or discharge instructions.

With this, you'll either want to:

- Locate and use a Cornerstone template
- Scan and attach handwritten completed forms to the medical record

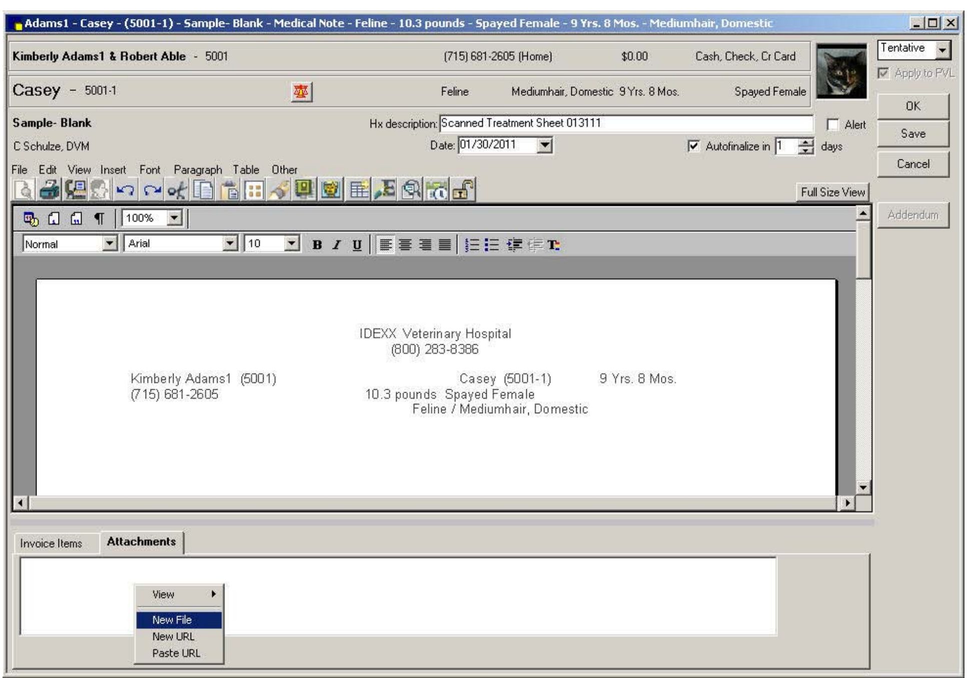
TRAINER-LED DEMONSTRATION

Preview the Sample Treatment Sheet displays.

1. Click on the **Correspondence** toolbar button.
2. Search or select your client or one of your practice or employee account. **[your demonstration client]**
3. When the *Patient List* window displays, select a patient. **[your Casey]**
4. Enter a *Staff ID*. **[C. Schulze, DVM]**
5. Enter a key word in the *Title or ID* field, select the document and click **OK**. **[type 'treatment' and select Sample Treatment Sheet]**
6. View the template, then cancel and don't save. **[Click on the Full Size View button. Cancel without saving.]**

TRAINER-LED EXPLANATION

Select the Sample-Blank medical note template, change the Hx Description, and attach the file.



1. Click on the **Patient Clipboard** toolbar button.
2. Search or select your client and patient.
3. Search and select the **Sample-Blank** document template.
4. Change the *Hx Description*.
5. Click on the *Attachments* tab, right-click in the white area and view the option **New File**.
6. 7. Proceed to attaching document or click **OK** to save the history information.

Take Home Prescriptions

Technicians will need to have take-home prescriptions ready for pick-up. Because technicians see many patients in a day and are very busy, have them use the Patient Clipboard so they can view the pet picture and ensure they have the right patient selected before prescribing.

TRAINER-LED DEMONSTRATION

After the technician prepares the bottle and has the lot and expiration in hand, navigate to the prescription window through the Patient Clipboard to prescribe a take-home antibiotic, Cephalexin for Qty 28, with instructions of 2X daily for 14 days.

1. Click the **Patient Clipboard** toolbar button.
2. Enter or find your client. **[your demonstration client]**
3. Select the correct pet and click the Patient Information tab so you can view the patient picture. **[click on Casey and the *Patient Information* tab]**
4. Right-click the pet and select **Prescribe**.
5. Enter the *Item ID* and the quantity. Note: Your practice may be using Cornerstone to track inventory and your administrator may have configured the system for staff to enter all or part of these inventory details, enter lot and/or expiration dates. **[enter 02408 Cephalexin, Qty 28]**
6. Enter the IDs for *Prescribed by* and *Filled by*. **[C. Schulze DVM and Chris Jennings, respectively]**
7. Enter the prescription instructions then click **OK**. **[Description = 1 TAB TWICE DAILY; OK then Cancel to <u>not</u> print; Close to not print the Pharmacy Sheets.]**

Post Procedure Updates

The doctor will want to view any remaining lab results and ensure the appropriate call backs are assigned to the technician. Additionally, the doctor can ensure or update the diagnoses to finalize and/or rule out previous entries.

TRAINER-LED DEMONSTRATION

Navigate to the Daily Planner > Diagnostics tab, view the lab results, then schedule a lab call back for technician Chris Jennings.

1. Click on the **Daily Planner** toolbar button. **[Daily Planner]**
2. Enter your staff ID. **[C. Schulze, DVM]**
3. Click on the *Diagnostics* tab. **[Diagnostics]**
4. With the **Posted results** check box selected, deslect the check boxes for the **Other types to include** (Ex. Pending requests and Orphan results). View then ***Close*** the results.
5. Click on the Open call back for the patient.
6. Click on the button located under the *Status* column of the lab result. Options are: **Call Now** and **Schedule a call back**. **[select Schedule a Call back]**
7. Enter the technician, select the note and click **OK**. **[Chris Jennings; note LAB-CB]**

TRAINER-LED DEMONSTRATION M

At the Daily Planner, navigate to the Patient Clipboard to ensure the diagnosis is finalized for Casey.

1. Click on the **Daily Planner** toolbar button. **[Daily Planner]**
2. Right-click on patient's lab result and select **Patient Clipboard**. **[find your Casey's lab results]**
3. On the *Patient Clipboard*, select the *Dx* tab and view, or update, the Diagnoses. **[view from Dx tab]**

Chapter Summary

You learned these important concepts within this chapter:

- **Update Documents** – Attaching documents and updating other important medical records and sample Cornerstone documents that the medical team may use post-procedure.
- **Take Home Prescriptions** – Navigate to the prescription window through the Patient Clipboard.

Chapter 8: Final Step: Check-Out

You'll learn these important concepts within this chapter:

- **Invoicing** – Using functionality from the Invoice window, Invoice the client, create a recheck appointment and take a client payment.
- **Reminders** – After invoicing, review the reminders and appointments with the client.

Invoicing

When the patient is ready to go home, you'll want to understand or ensure:

- that all charges are entered and have been verified by the medical team
- that all special actions have been performed (Note: Some special actions are set to process at a time other than invoice posting.)
- that Cornerstone updates the reminder information and the patient's medical file
- how to generate and invoice with departing instructions
- the unique buttons on the invoice window
- that Cornerstone will deplete or subtract inventory item quantities, if tracking quantities on hand
- that invoicing adds the invoice total to the practice's sales totals
- that invoicing adds the invoice total to the client's account receivable balance and account history

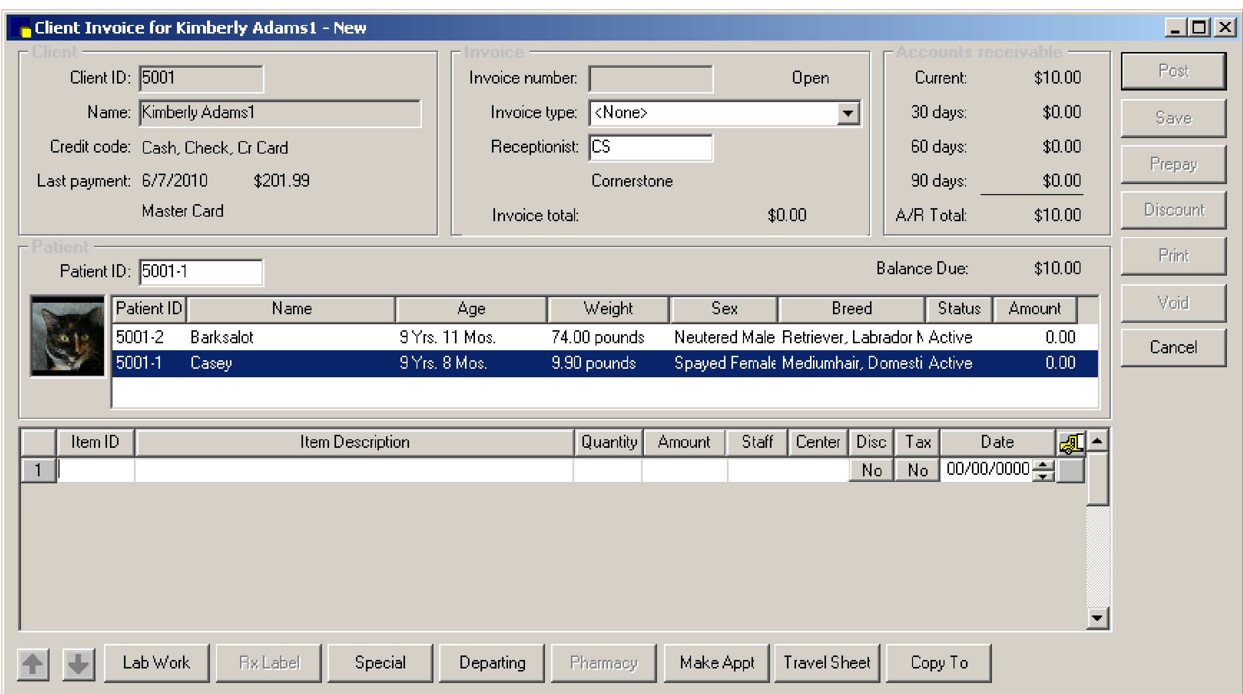
TRAINER-LED DEMONSTRATION

Invoice your demonstration account for Casey.

1. With the client's account displayed on the *Patient Clipboard*[*], right-click the patient's name in the *Patient list* area and select invoice. **[Right-click and select Invoice.]**
2. At the *Invoice #* field, press **Tab**. **[Tab]**
3. Select an Invoice Type from the list and press **Tab**.
4. Enter your staff id in the *Receptionist* field and press **Tab**.

Continued...

Now, let's learn about the unique buttons on this window.



Invoice Window Buttons

Use the table below to learn the invoice screen button functions.

Bottom Buttons	Function
Lab Work	If Lab work has been added to the invoice and a lab request has not already been entered, or if you need to add additional lab tests onto a pending request, click the **Lab Work** button. For more information, please refer to the appropriate laboratory training tool (*SmartLink*[*] *InHouse Lab Training, SmartLink Reference Lab Training, Canada East/West Reference Lab Training*).
Rx Label	To create a prescription instruction for a prescription that is on this invoice, highlight the item ID code for this item and click this button.
Special	If the **Special** button is enabled, it indicates there are invoice items on the invoice with special actions to process.
Departing	Click the **Departing** button to view the departing instructions that are linked to items on the invoice. You can add departing instructions to this list while you are invoicing. Press **F2** or double-click to select from the Departing Instructions list. To modify a departing instruction, click the **Note** button and make appropriate changes. Instructions modified for this one instance.
Pharmacy	If you have purchased the Veterinary Pharmacy Reference (VPR *), you can select the **Pharmacy** button to print Client Information Sheets and Drug Information Sheets.
Make Appt	Click the **Make Appt** button to go to the *Appointment Scheduler* and from there, search for an available appointment slot and schedule an appointment.
Travel Sheet	Select invoice items from a *Travel Sheet*.
Copy To	The **Copy To** button allows you to copy invoice items from one patient to another.
Post	The **Post** button allows you to finalize the invoice and continue to the *Payment* window.
Save	Save the invoice as 'open' so you can make changes or add to the invoice. Items on saved invoices are not counted as revenue at the end of the day until the invoice is posted.
Prepay	Apply a deposit to the invoice. This feature may be used with large animal, equine or other situations where a client is making a payment prior to services being rendered (like on an estimate for today's visit), or when a client does a large amount of business within a month and only wants to be billed monthly. An invoice can be opened at the beginning of the month (or at the first visit of the month), saved, added to during the month and either closed during end of month processing or posted before end of month processing is run.
Discount	Use the **Discount** button to apply a manual discount [by amount or percentage] to the entire invoice total.
Print	Prints the invoice. Cornerstone will ask if you want to save the invoice first. The invoice must be saved before it will print. This feature is helpful if the client would like to see a copy of the invoice prior to paying.
Void	This will void the invoice. Depending on your practice setup this may be a management feature only; based on security setup.
Cancel	Cancel the invoice and send invoice items back to the *Patient Visit List* (if generated from the *Patient Visit List*). If cancelled; any changes added since the invoice was saved last are canceled.

5. Click on the pet to be invoiced. **[your Casey]**
6. If applicable, transfer items from the *Patient Visit List*. Address duplicate items as needed. **[Transfer]**
7. Enter additional invoice items. **[your trainer will provide input]**
8. Perform other features such as discounts, taxes, verify inventory details, process special actions, or make an appointment. **[your trainer will provide input]**

    8.1 At the bottom of the invoice, click **Make Appt** 

. **[click Make Appt]**

    8.2 Using the **Go To** 

button, go to the date and make the appointment. **[Go To > one month from today, C. Schulze, DVM, Lab Work, Notes = CBC]**

    8.3 **Close** the *Appointment Scheduler*. **[Close]**

9. Click the **Post** 

button. **[Post]**

    9.1 If Special Actions are prompting for completion, address them. **[Process Casey's Special Actions.]**

    9.2 If there are open PVLs for other patients belonging to this client, address them. **[Barksalot - Continue his Special Actions.]**

10. Accept or modify the post invoice information. Click **OK**. The *Payment* window displays. **[OK]**
11. If your practice chooses to use this feature, enter your Cashier password and press **Tab**. **[use your assigned cashier password and press Tab]**
12. Enter the payment amount using a decimal point for uneven dollar amounts and press **Tab**. **[Enter payment amount and press Tab.]**

    12.1 Optional: Right-click in the amount field and choose **Invoice Balance** or **Client Balance** to have the amount fill in automatically. This helps to reduce entry errors.

13. Select the *Payment Type* from the list. If required, answer the payment type prompt. **[Visa]**
14. **Tab** to the *Change given* field to verify the *Balance after payments*. **[verify]**
15. Click **Post**. **[Post]**

Invoicing DOs

- Use a travel (treatment, circle) sheet.
- Set defaults for staff members.
- Set up revenue centers.
- Set a default staff for prescription labels and rabies tags (if your practice has only one doctor).
- Enter default information for rabies vaccine.
- Set up group items and smart groups to use when invoicing.
- Create pick lists.
- Create dispensing item codes.
- Attach departing instructions to invoice items.
- Attach prescription instructions to pharmaceutical items.
- Attach tax information to invoice items.
- Set up and attach any applicable discounts to invoice items.
- Set up special actions for invoice items.
- Set up and attach price change reasons.
- Assign discounts and accounts receivable information for clients.
- Select the **Window** menu to find a "lost" invoice window.

- View only one open invoice on a computer at one time.

Invoicing DON'Ts

- Don't use frivolous items or create frivolous invoices. Otherwise, average transactions will be lower than they should be.
- Don't use miscellaneous codes to enter comments under invoice items. Instead, use departing instructions to enter the comments.

Peak-Time Invoicing Shortcut:

1. Click on the **Daily Planner** toolbar button.
2. Click box for 'view for all staff' and click on *Patient Visit List* tab.
3. Sort list by client or patient information by clicking on header, double-click any PVL on list to open.
4. Review items, adding items or updating items as needed.
5. Click **Invoice**, post and pay as usual
6. After the invoice is posted, you are returned to the *Daily Planner's PVL* tab. Now you are ready to invoice the next client.

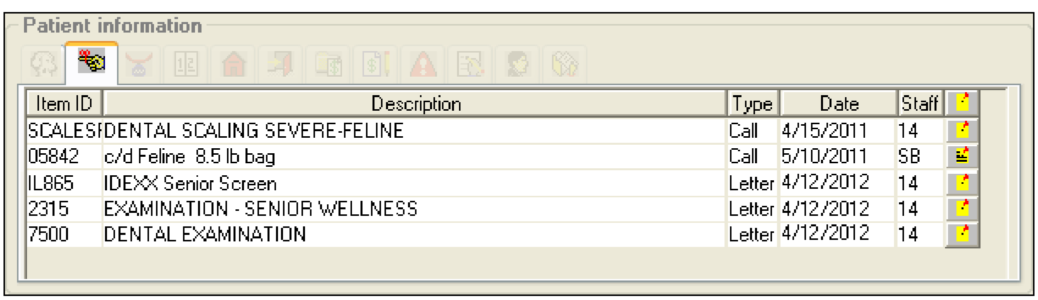
- When invoicing CASH clients, remember that you can't track the history. If there is a possibility that the person can return, set up an account so there will be history.
- If a client has more than 20 pets, double-click in the Patient ID field to search for the patient.
- When using a miscellaneous code, the description you type in the invoice will appear in the patient's history. However, in reports listing the code, the description will still be "miscellaneous".
- Remember, all items listed on an invoice impact transaction and invoice averages.

Reminders

At the end of a patient's visit, after invoicing, review the patient's reminders with the client to confirm timelines and expectations. Access them from the *Patient Clipboard's* patient *Reminders* tab.

Review Reminders

1. Check to see if there are reminders that need to be created or deleted.
   - Does the client want to be reminded to purchase more food in a few weeks?
   - Are there future wellness or other services or lab tests that need a reminder?
   - Are there reminders that need their dates changed?
2. Does the client want a printout of their reminders?

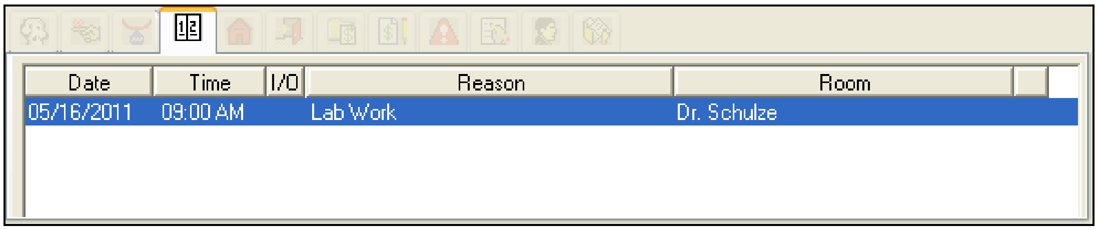


Item ID	Description	Type	Date	Staff
SCALESI	DENTAL SCALING SEVERE-FELINE	Call	4/15/2011	14
05842	c/d Feline 8.5 lb bag	Call	5/10/2011	SB
IL865	IDEXX Senior Screen	Letter	4/12/2012	14
2315	EXAMINATION - SENIOR WELLNESS	Letter	4/12/2012	14
7500	DENTAL EXAMINATION	Letter	4/12/2012	14

Review Appointments

View a snippet online demonstration

1. What appointments need to be set for upcoming dates?
    - Lab work
    - Rechecks - Follow-ups
    - Suture removal
    - Wellness visits
    - Future services
    - Ongoing therapy services (remember to use the copy/paste feature)



TRAINER-LED DEMONSTRATION

Review reminders and appointments for Casey.

1. From the *Patient Clipboard* with the client/patient displayed, select the *Reminders* tab. **[select the *Reminders* tab for Casey]**
2. Right-click in the work area and select **Update**. **[Update]**
    - 2.1 Add reminders (click on the next blank line and add the reminder information). **[Add a reminder to send to your demonstration client in 4 weeks and remind for a bag of c/d Feline 8.5lb bag (ID=05842)]**
    - 2.2 Delete reminders (click the Item ID to delete and press CTRL + D).
    - 2.3 Change reminder date (select the Item ID and click Change Date; then change the date information).
    - 2.4 Print the reminders (click **Print**).
3. From the *Patient Clipboard*, with the patient selected, select the *Appointments* tab. **[select the *Appointments* tab for Casey]**
4. View and confirm the patient's appointments. **[Casey has a recheck appointment in 1 month.]**
5. **Close** the *Patient Clipboard.* **[Close]**
6. **Close** all open windows. **[Window > Close ALL; or ALT + W + A]**

Chapter Summary

You learned these important concepts within this chapter:

- **Invoicing** – Using functionality from the invoice window, Invoice the client, create a recheck appointment and take a client payment.
- **Reminders** – After invoicing, review the reminders and appointments with the client.

Basic Foundation: Section 3

End of Day

Chapter 1: End of Day Activities

You'll learn these important concepts within this chapter:

- **Payments** – Apply a payment to a client's account.
- **Account Comments** – Add a comment to a client's account.
- **Process End of Day** – Process End of Day in Cornerstone.
- **End of Day Reports** – Print End of Day Reports.
- **Daily Planner - Callbacks** - View and update callbacks and print the Call Back Report.
- **Other Procedural Steps**

Payments Ⓡ

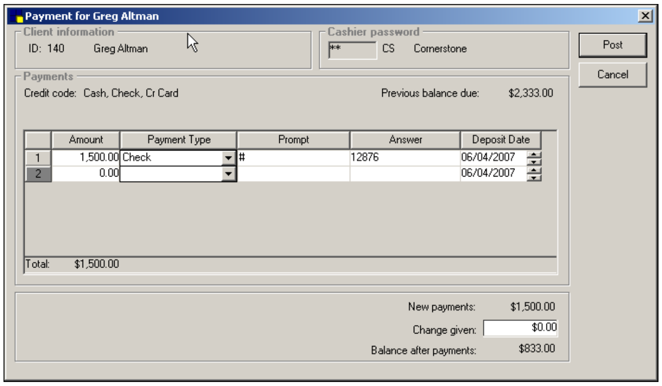
This lesson demonstrates applying a payment the client's account. Accounts are clearly marked to reflect balances due and credit balances.

TRAINER-LED DEMONSTRATION

You received a check in the mail from Altman's Farms. Please credit the client's account.

Trainee Note: The balance will reflect correctly in the training database if you are the first trainee to complete this lesson. If more than one trainee has already completed this lesson in the database, the client in this demonstration may not show a balance due; but you may proceed anyway.

1. Click the **Client Account** toolbar button. **[Client Account]**
2. In the *ID* field search for and select the client ID. [**ID: 140; Client: Greg Altman**]
3. Click the **Payment** button. **[Payment]**
4. Type your *Cashier ID*. [**Enter your assigned Cashier Password**]
5. Type in the appropriate payment information. [**Amount: 1500.00; Payment Type: Check; Number: 12876**]
6. Click **Post**. **[Post]**



7. Click **Yes** to print or **No** to not print and return to the *Client Account* window. [**For Training Purposes click No**]

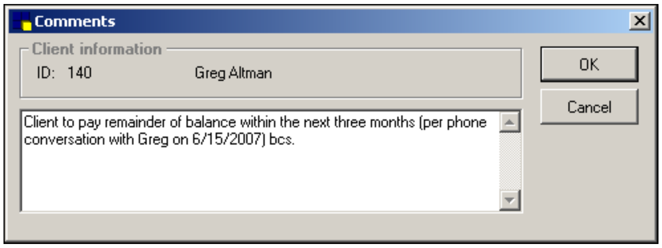
Account Comments Ⓡ

In this lesson you'll learn how to add a permanent comment regarding financial information to a client's account.

TRAINER-LED DEMONSTRATION

In this demonstration you will add a comment to Greg Altman's account stating that the remainder of the balance will be paid in full within the next three months.

1. Click the **Client Account** toolbar button. **[Client Account]**
2. In the *ID* field search for and select the client ID. [**ID: 140; Client: Greg Altman**]
3. Click the **Comment** button. **[Comment]**
4. Type in the comment. [**Client to pay remainder of balance within the next three months per phone conversation with Greg on (Today's date) (your initials)**]
5. Click **OK**. **[OK]**



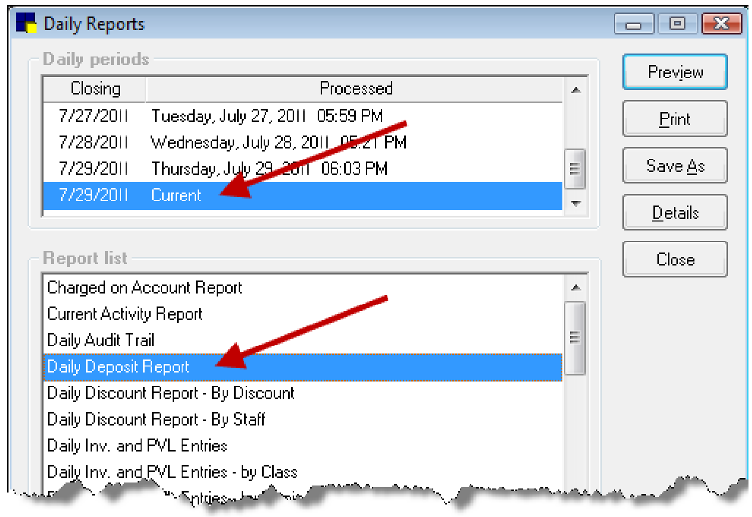
Process End of Day Ⓡ

In this lesson, you'll learn the steps to process the End of Day information at your practice. This procedure is generally done in conjunction with balancing your cash drawer and calculating your deposit. In addition, it helps you track database information that is important for managing your practice.

TRAINER-LED EXPLANATION

It is imperative for your practice to have a good backup procedure in place. Backups provide security against the unlikely event that files are lost or destroyed. As an added safety precaution, you should remove the most recent backup from the practice and/or place it in a DATA-Rated fireproof safe. Contact the System Administrator at your practice, or Cornerstone Support at 1-800-695-2877, if you have questions about your backup procedure or how to verify that your backup was successful. Do not take chances with your practice's data.

Trainee Note: Only 1 person can process end of day.

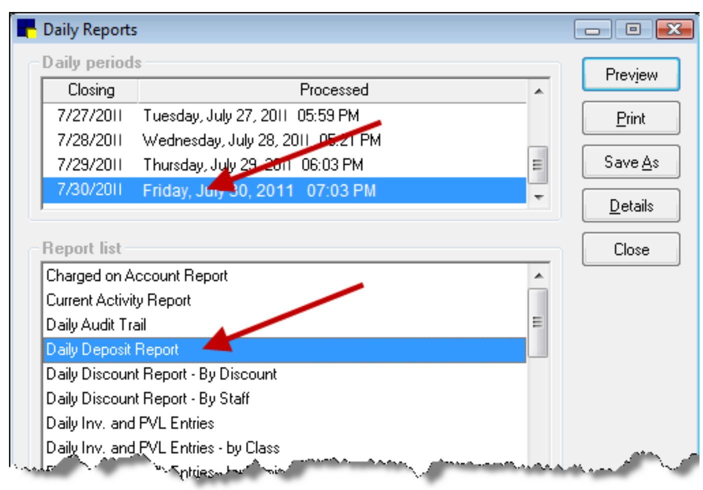


1. From the **Menu** bar, select **Reports** > **End of Period** > **End of Day**.
2. Select **Current** and **Preview** or **Print** the *Daily Deposit Report* to balance your cash drawer. Make any corrections before proceeding. Use the *Daily Payment Register - by Payment Type* to find corrections needed.
3. Optional but Recommended: Run your backup.
4. From the **Menu** bar, select **Activities** > **End of Period**.
5. Select **End of Day**.
6. The following message displays: *A daily backup should be made prior to processing end of day*. Click **OK**.
7. In the *Note* field, type in your initials and click **OK**.
8. The following message displays: *Process end of day for* _____? Click **Yes**.
9. When End of Day has finished processing, click **OK** on the *Daily Period Closing* window.
10. Print your daily reports. Follow your practice's protocols for printing reports.

End of Day Reports R

Printing End of Day Reports

In this lesson, you'll learn how to print End of Day reports. This procedure is generally done in conjunction with processing End of Day.



TRAINER-LED EXPLANATION

In this demonstration you will run the End of Day reports for the same period for which you just ran End of Day in the previous lesson.

1. From the **Menu** bar, select **Reports** > **End of Period** > **End of Day**.
2. In the *Daily periods* area, select the period you want the reports to reflect.
3. In the *Report list* area, a default selection of reports is highlighted. Click **Print** to print the default selection of reports. Or, double-click a report name to preview the report separately.
4. At the *Reports Preview* window verify that this report contains the information for which you are looking. To print the report; click **Print**.
5. Select the print options and click **OK**.

When to Print End of Day Reports

End of Day reports can be printed at any time. However, for totals that reflect the End of Day amounts, they should be printed after you have processed EOD.

- Performing monthly activities creates a second EOD closing:
    - These totals include added finance charges, billing charges and open invoices that were closed as part of EOM processing.

For the last EOD of the month, print the EOD sales reports again after processing EOM so the reports will include the information for the second EOD closing.

DAILY PLANNER - CALL BACKS R M

View a snippet online demonstration

This lesson illustrates accessing and using the *Call Backs* tab of the Daily Planner as well as printing the *Call Backs* report.

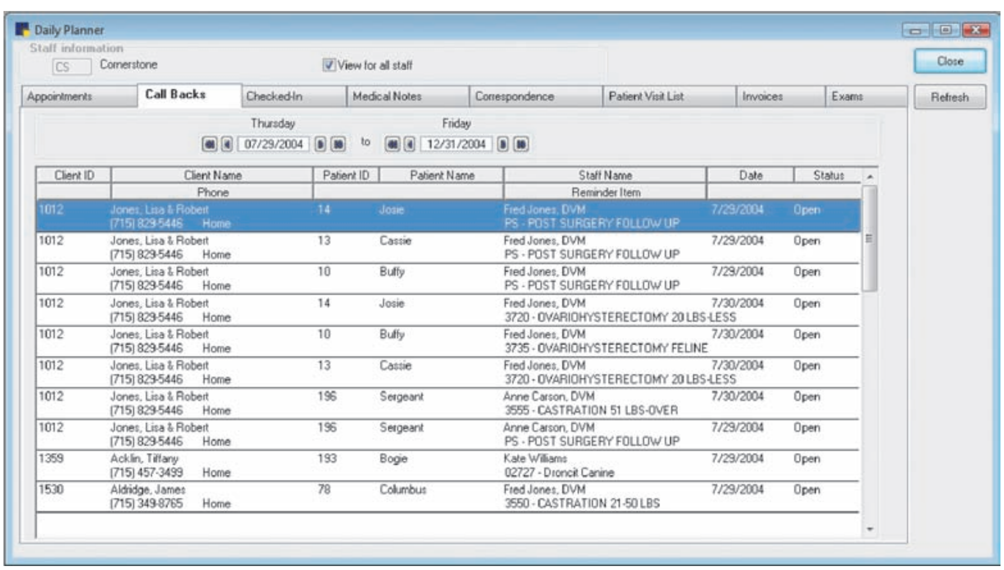
Viewing and Updating Call Backs

This lesson shows you how to view and update call backs. This is a convenient place to view and update patient records as reminder calls are made. You have a clear view of who is responsible for the calls, and the information pertaining to those calls.

TRAINER-LED DEMONSTRATIONS

In this demonstration you will update a call back.

1. Click the **Daily Planner** toolbar button.
2. Select the *Call Backs* tab.
3. Select the check box for **View for all staff** to view items for all staff members.
4. Choose the date period.
5. Right-click a patient to **Update**, **Delete**, view or add a **Note**, **Change Date**, access the **Patient Clipboard*** or **Refresh** the *Daily Planner*. **[Use the patient call back you creted previously in a trainer-led demonstration.]**



6. Double-click an entry and the *Patient Reminders* window displays.
7. Click **Change Date** to view a calendar and change the due date for this reminder. For this demonstration, do not change the due date.

8. Click **Print** to print a list of the reminders. If you do not have access to a printer during training, do not click **Print**.
9. Click **Open** to enter a note and change the status of the reminder.
10. In the *Note* window, enter your staff ID (**CS**) and press **Tab**.
11. Click the arrow for *Status* options. Options are **Open**, **Pending** and **Completed**. **[select Completed]**
12. You can either enter a note manually, or click **Select Note** to choose from a list of prepared responses. **[select the note Left message @ home from the list]**
13. The message that displays can be modified. Simply click within the text and make changes, or highlight a portion to change or delete. Click **OK** to save the changes. **[delete the text: Left instructions for follow-up care and reported findings]**
14. Click **OK** to save all changes. The completed call backs no longer appear on the *Daily Planner*.
15. Click **Close** to close the *Daily Planner*.

Printing Call Backs

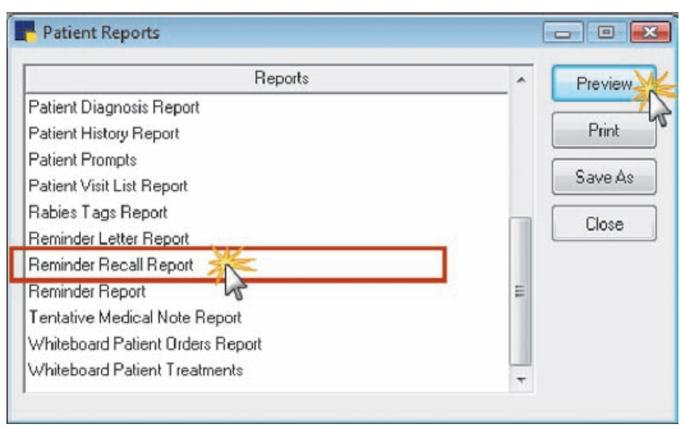
For the times that you need a printed copy, this lesson demonstrates how to print a call back list. Use this easy-to-read report to make the calls and write your follow up notes. Then, use the report as a reference to add your notes and change the call back status.

TRAINER-LED DEMONSTRATION

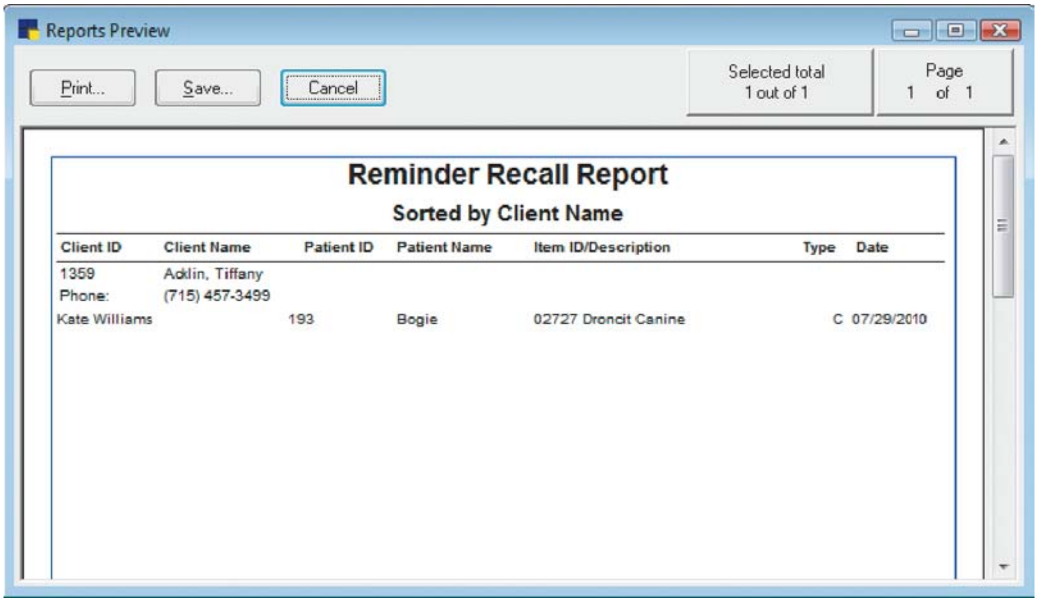
1. From the **Menu** bar, select **Reports** > **Patient**.
2. Select the *Reminder Recall Report*.
3. Click **Preview**.
4. Add any *Range* information, if necessary.
5. Click **OK**. A preview displays.
6. Click **Print**, **Save** or **Cancel**.

In this demonstration you will print the Reminder Recall Report for printing and viewing call backs.

1. From the **Menu** bar, select **Reports > Patient**.



2. Locate and double-click the *Reminder Recall Report*. Use the scroll bar to locate the report if needed.
3. Click **Preview**.
4. Along with these default selections:
   - 4.1 Change the *Sort order* to **Client Last Name** to sort the report by client last name.
   - 4.2 In the second *And/Or* row select **AND**.
   - 4.3 A third *Description* list displays; select **Reminder Date**. When you press **Tab**, the system date will automatically display. **[change both dates to 04/15/2011**]
   - 4.4 In the third *And/Or* row select **AND**.
   - 4.5 A fourth *Description* list displays, select **Staff ID**. Type **kw** as the staff ID in the *Starting* and *Ending values* fields.
5. Click **OK** to preview the report.



This report shows that Kate Williams has one call back to complete.

6. You may choose to **Print** a copy, **Save** the report as a text file, or **Cancel** to exit the report window. For this demonstration, click **Cancel**.
7. **Close** any remaining report windows.

Other Procedural Steps

Processing Multiple Payment Types

1. With the client's account displayed in the *Patient Clipboard**, click the *Account Information* tab.
2. Right-click in the *Transaction Description* area and select **Payment**.
3. Enter the payment amount and select the payment type; press **Tab** after each field. Answer any prompts.
4. **Tab** to next *Payment Amount* field. Enter the second payment amount and select the second payment type.
5. **Tab** to the *Change given* field to verify the *Change given* and *Balance after payments* amounts.
6. Click **Post**.
7. At the print questions, click **Yes** or **No**.

Billing to a Client

1. With the client's account displayed in the *Patient Clipboard**, right-click the patient's name in the *Patient list* area and select **Invoice**.
2. At the *Invoice #* field, press **Tab**. Cornerstone automatically assigns the invoice number when an invoice is posted or saved.
3. Enter the staff ID in the Receptionist field and press **Tab**.
4. Select the patient for whom charges are to be entered.
5. At the *Item ID* field, enter the ID of the item to be added to the invoice and press **Tab**. Press **F2** or double-click to search.
6. Enter the *Quantity*, *Price*, *Staff ID*, and *Revenue Center*.
7. Repeat steps 5-6 to add additional items to the invoice.
8. Click **Post**.
9. At the *Post Invoice* window, deselect the **Apply Payment** and **Print Invoice** check boxes and click **OK**.
10. The balance is billed to the client's account.

Voiding a Payment

To void a payment NOT attached to an invoice:

1. In the *Client Account* window, double-click the payment to be voided. The *Payment* window displays.
2. If your practice uses the Cashier Password feature: in the *Cashier Password* field, type your **Cashier Password**.
3. On the *Payment* window, click anywhere within the payment row to be voided.
4. Click the **Void** button or press **CTRL+D**. A message appears to confirm the void/delete action.
5. Click **OK** to close the message and then click **Post** to void the selected payment.
6. On the *Payment for [Client name]* window click **Yes** to print the payment void or click **No** to close without printing.
7. Close the *Client Account* window.

To void a payment attached to an invoice:

1. In the *Client Account* window, click on the invoice that contains the payment to be voided.
2. Click the **View** button. The *Client Invoice* window displays.
3. Click the **Payment** button. The *Payment* window displays.
4. If your practice uses the Cashier Password feature: in the *Cashier Password* field, type your **Cashier Password**.
5. On the *Payment* window, click anywhere within the payment row to be voided.
6. Press **CTRL+D**. A message appears to confirm the void/delete action.
7. Click **OK** to close the message and then click **Save** to void the selected payment. The *Payment* window closes.
8. Close the *Client Invoice for [Client Name - Client ID]*.
9. Close the *Client Account* window.

X-Charge Payment Processing: Initiating a Credit or Debit Card Payment from Cornerstone

1. On the *Payment* window, if your practice is set up to use cashier IDs, enter your cashier password and press Tab.
2. In the *Amount* field, type the amount or right-click to select **Client balance** or **Invoice** balance and press **Tab**.
3. In the *Payment Type* field, select **Credit Card Payment** or **Debit Card Payment**, and then press **Tab**.
4. Depending on the third-party payment processing provider you have set up, a *Payments Login* window may appear. Enter your **[Username]** and **[Password]**, and then click **Login**.
5. When the *Card Payment Processing* window displays swipe the card through the card reader, complete all required fields and process the transaction.
6. On the Payment dialog box in Cornerstone, the transaction information displays in the *Payments* area with the Status field indicating if the transaction was approved.
7. On the *Payment* window, click **Post** to accept the transaction.

X-Charge Payment Processing: Voiding a Credit or Debit Card Transaction in Cornerstone

1. With the client information displayed in the *Client Account* window, click on the payment transaction to be voided and click **View**.
2. On the *Payment* window, if your practice is set up to use cashier IDs, enter your **[cashier password]** and press **Tab**.
3. Click anywhere within the transaction row to be voided, and then click **Void** (or press **CTRL+D**). A message appears to confirm the void/delete action.
4. Click **OK** to close the message and void the selected transaction.

X-Charge Payment Processing: Processing a Credit or Debit Return

1. In the *Payment* window, if your practice is set up to use cashier IDs, enter your **[cashier password]** and press **Tab**.
2. Type the return amount as a negative number (ex. -13.50) in the Amount field and press **Tab**.
3. Select either **Credit Card Payment** or **Debit Card Payment** for the payment type, and press **Tab**.
4. On the *X-Charge Credit/Debit Card - Return* window complete all required fields and click the **Process** button (or press **F12**).

Reprinting a Receipt for an X-Charge Transaction

1. In the X-Charge software (**Start** > **Programs** > **X-Charge** > **X-Charge**), click the **Lookup** button.
2. Use the available fields to specify a date range or batch number for the desired transaction, and then click the **Search** button.
3. Select the desired transaction in the list, and then click the **Receipt** button. The receipt information displays in a *Receipt Preview* window.
4. Click the **Printer** icon on the toolbar to print a copy of the receipt.

Correcting Payment Amounts

1. With the client's account displayed in the *Patient Clipboard**, select the *Account Information* tab.
2. Right-click in the white area and select **Payment**.
3. Type a **Cashier password**, if applicable, and press **Tab**.
4. In the payment *Amount* field, enter the amount that is being corrected as a negative amount (ex: -$95.00).
5. Select the same *Payment Type* as originally entered.
6. In the next *Amount* line, enter the correct amount in the payment *Amount* field and select the correct *Payment Type*.
7. **Tab** to the *Change given* field to verify the *Balance after payments*.
8. Click **Post**.
9. Click **Yes** or **No** to print.

Correcting Payment Types

1. With the client's account displayed in the *Patient Clipboard**, select the *Account Information* tab.
2. Right-click in the white area and select **Payment**.
3. Type a **Cashier password**, if applicable, and press **Tab**.
4. In the payment *Amount* field, enter the amount that is being corrected as a negative amount (ex: -$50.00).
5. Select the *Payment Type* as originally entered.
6. In the next *Amount* field, enter the same amount as was originally entered. Select the correct *Payment Type*.
7. **Tab** to the *Change given* field to verify the *Balance after payments*.
8. Click **Post**.
9. Click **Yes** or **No** to print.
10. Change the Hx Description.
11. Click on the Attachments tab, right-click in the white area and view the option New File.
12. Proceed to attaching document or click OK to save the history information.

Chapter Summary

You learned these important concepts within this chapter:

You'll learn these important concepts within this chapter:

- **Payments** – Apply a payment to a client's account.
- **Account Comments** – Add a comment to a client's account.
- **Process End of Day** – Process End of Day in Cornerstone.
- **End of Day Reports** – Print End of Day Reports.
- **Daily Planner - Callbacks** - View and update callbacks and print the Call Back Report.
- **Other Procedural Steps**

Basic Foundation: Section 4

Additional Cornerstone Features

Chapter 1: Reports

You'll learn these important concepts within this chapter:

- **Reports Overview** – Report Search window elements, how the Search field works, how to restart or reset your search and what locked reports mean.
- **Report Selection** – How to use the Sort Order for report appearance and how to use Sort Range to effectively filter data.
- **Report Output** – Learn how to preview a Report, print a Report, save a report as a PDF File, save a report as a text file.

Reports Overview [R] [M]

In this lesson, you'll acquire a general understanding of how to search for reports. In later lessons you'll learn how to filter data for a chosen report and how to control your output.

Once Cornerstone is up and running, use the predefined reports to find answers to your questions within approximately twenty report categories. Cornerstone's Report Search window allows you to search within these categories by key words, then view the report fields, report description and a sample report, all from a single window.

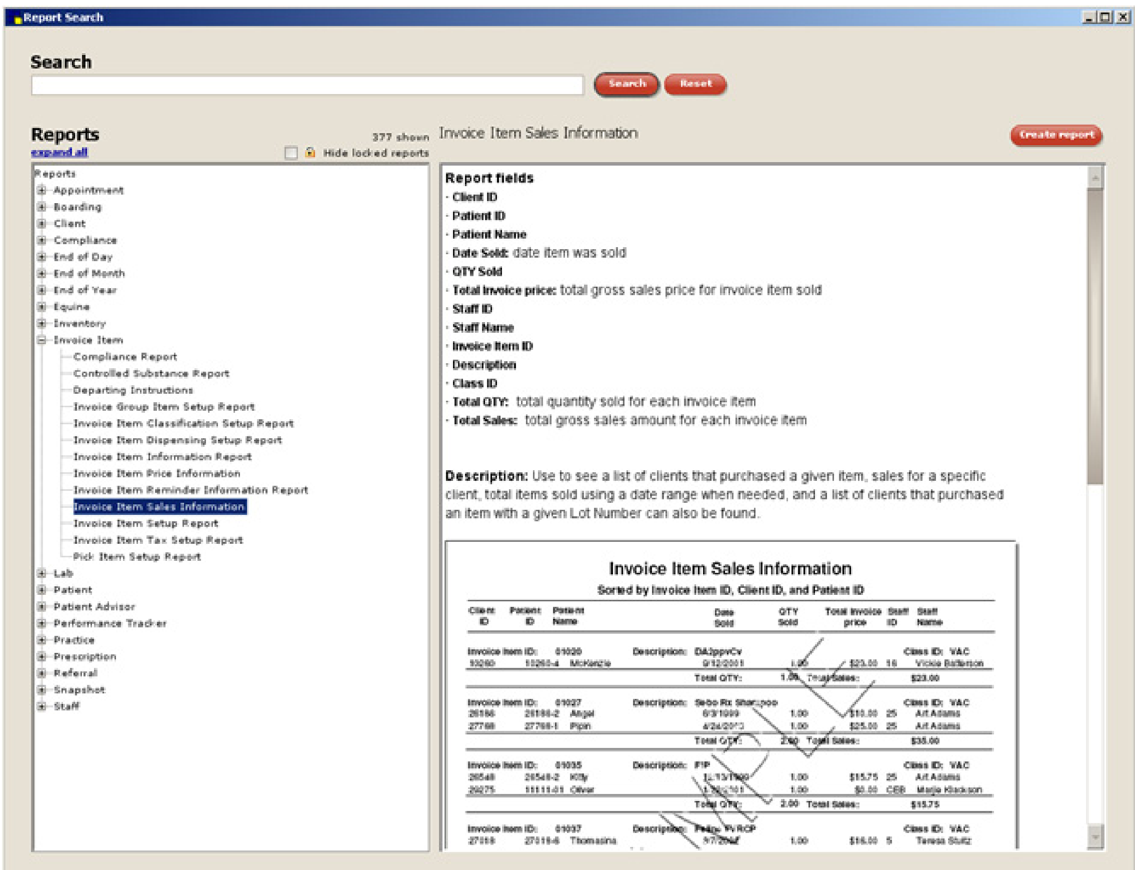
Here's what you'll learn about:

- Report Search window elements
- How the Search field works
- How to restart or reset your search
- Definition and icon for a Locked Report

TRAINER-LED DEMONSTRATION

Search for a report that shows quantities sold for a specific item. Search using 'quantity sold' and 'QTY sold' Preview the Invoice Item Sales Information Report.

1. On the *Reports* menu, select **Find a Report**. The *Report Search* window appears.



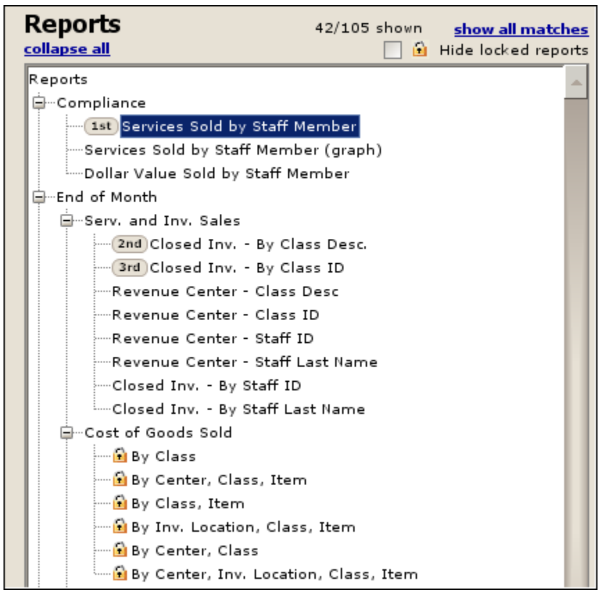
Note the following areas and items:

- Search field
- Alphabetical report category listing
- Left pane with report categories. Use **+** to expand and **–** to shrink the category.
- Right pane with report fields, descriptions and a sample report

2. In the *Search* text box, type a search keyword or phrase and click **Search**. **[Enter 'quantity sold'. Note the results show that the top report doesn't include the report *Invoice Item Sales Information* report.]**

Report Search Capabilities

Cornerstone searches for your keyword in the report name, description, filters and fields, and then displays the ranked results in the *Reports* list. Use the table below to become familiar with the search capabilities:



Thesaurus-like Intelligence	Common variations or abbreviations in Cornerstone will be included automatically. For example, a search on "dog" will automatically include "canine" in the search, and a search on "PVL" will automatically include "Patient Visit List" in the search.
Max # of Characters	You can type up to 100 characters in the Search text box.
Search Results	The top five report matches are displayed in ranked order within their expanded report groups. The top ranking report is automatically selected in the tree.
Use Quotation Marks	Type words within quotation marks to search for multiple words in exact order. For example, "price change reason" gives different results than price change reason.
Use Boolean searches	The operators AND, OR and NOT are supported in uppercase, with grouping supported using parentheses. For example, you might search on (daily OR monthly) AND "sales tax" to find reports that include sales tax information—specifically daily or monthly reports.
Essential Word Search	Place a plus sign (+) in front of an essential word that is required in the search.
Exclude Words	Place a minus sign (-) in front of a word to exclude the term from the search and narrow the results. For example, -month +"deposit report" will filter out monthly reports from your search of deposit reports.
Show Matches	The blue text toggles between 'show all matches' and 'show best matches.' If you see 'show all matches' that indicates you are now looking at all the best matches.

3. Click the **Reset** button to clear all fields and start your search from the beginning.
4. In the *Search* text box, type a search keyword or phrase and click **Search**. **[Enter *QTY sold*. Note that the top report now includes the report, '*Invoice Item Sales Information* report'.]**
5. Click **Create report**.

Locked Reports

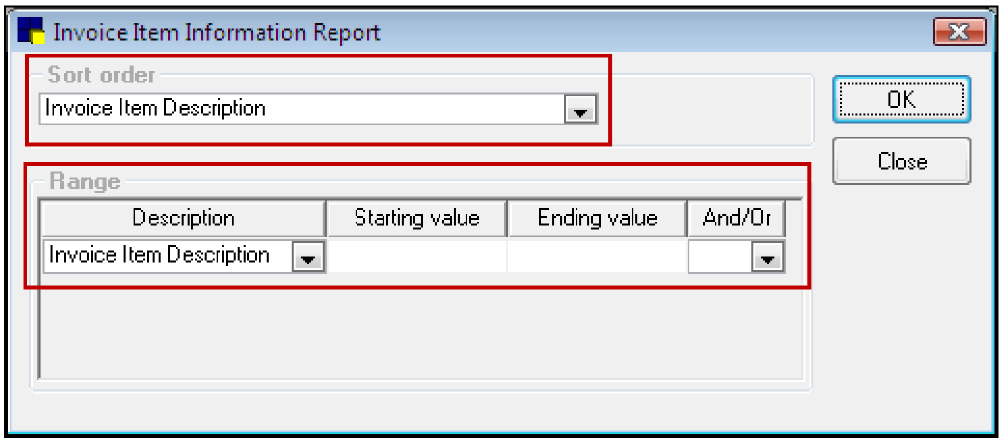
Cornerstone Security Setup allows a Cornerstone Administrator to specify report access for each staff member. If it's a locked report, you'll see the lock icon in the left pane and in the right pane only a sample of the report. Note: If the Hide locked reports check box is selected, the number of hidden reports, if any, is displayed in parentheses ( ).

Report Selection

For each of the reports available in Cornerstone there are a variety of options regarding the order in which information displays and the selection of information to include. This lesson reviews the options and provides general guidelines that will be useful when printing a particular report. It includes:

- Sort Order and Range
- Starting Value and Ending Value
- Using And/Or Statements
- Entering a Specific Value
- Entering Multiple Values

Sort Order and Range



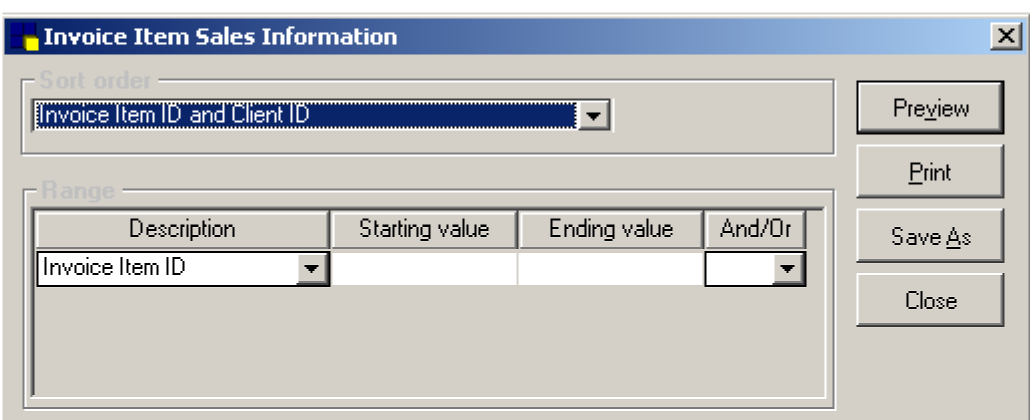
Once a report has been chosen a window that contains two main sections displays: Sort order and Range. This window will vary in appearance and some reports, such as end of period reports, do not offer sort order options.

Sort Order: The sort order options allow you to select the order in which the information appears on the report (ex. in order by client last name or by patient name). It is not necessary to change the default sort order. The options available on the Sort order drop-down list vary depending upon the report selected. Some examples of available sort orders are Client Last Name, Client ID, Postal Code, Invoice Item Description, and Patient Name.

Range: The range options allow you to select the information that will be included on the report (ex. sales information for invoice item ID 40380 only or sales information for all nutrition items). It is not necessary to enter a range. If a range is not entered, all available information will be displayed (ex. sales information for all invoice items). Some examples of available ranges are Invoice Date, Species ID, Client ID, and Account Balance.

Range - Starting Value and Ending Value

Use this table to understand how to use the Starting Value and Ending Value fields.



Examples and Options	Starting Value	Ending Value
Active data	Active	Active
Starting from xx/xx/xx to Today	i.e. 01/01/2010	*Leave Blank*
Starting at the beginning and ending until xx/xx/xx	*Leave Blank*	i.e. 01/01/2010
All data	*Leave Blank*	*Leave Blank*

Using And/Or Statements

You must use And/Or statements if you want to use multiple filters. And/Or statements tell Cornerstone to find information that meets the selected conditions.

- If you select **And**, Cornerstone includes information that meets both criteria.
- If you select **Or**, Cornerstone includes information that meets either of the criteria.

For example, if you choose:

Description	Starting Value	Ending Value	And/Or
Date Issued	01/01/10	12/31/10	AND
Tag ID	500	1000	

In this scenario, you would generate a report of rabies tag information of only those rabies tags issued on January 1, 2009 through all of December 31, 2010 that have a tag number between 500 and 1000.

If you choose:

Description	Starting Value	Ending Value	And/Or
Date Issued	01/01/10	12/31/10	OR
Tag ID	500	1000	

In this scenario, you would generate a report of rabies tag information from all rabies tags issued on January 1, 2009 through all of December 31, 2010, as well as any rabies tags with an ID between 500 and 1000 (issued on any date).

Entering a Specific Value

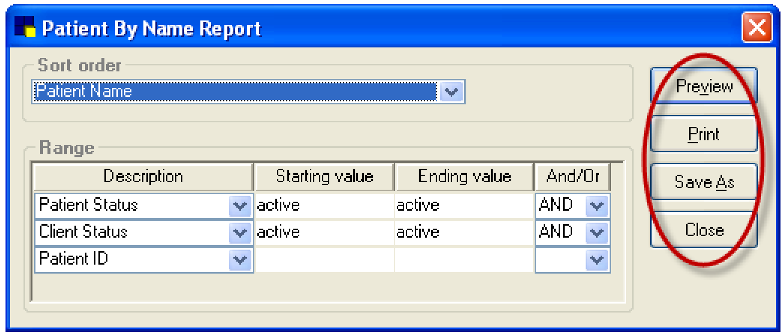
There are a few conventions to follow when entering values in the Starting and Ending value fields. Following these conventions will ensure that the report will present the desired information.

- With the cursor in the Starting or Ending value field press **F2** to select from a list of available options.
  - Use F2 for a lookup of any range option that has ID in its name (i.e. Client ID, Species ID, Patient ID) for accuracy and efficiency.
  - If an F2 list is not available, nothing will happen when you press it.
- When entering dates, the current date will populate the field when you first click in it. To select a different date enter the date using the proper format (M/D/YY), or you can press **F2** or double-click to select from a calendar that will display.
- When entering dollar amounts, do not enter the dollar symbol ($). Simply enter the number that corresponds.
- Cornerstone uses **alphanumeric** sorting, which allows for IDs that include both numbers and letters. This means that numbers are treated as letters when they are sorted (like a dictionary). Numbers do *not* appear to be sorted “numerically” so that the ID “10” appears after “1”, and before “2”.

Report Output R M

For each of the reports available in IDEXX Cornerstone there are a variety of options for printing or saving the information. This lesson reviews these options and provides general guidelines that will be useful when printing a particular report. This includes:

- Previewing a Report
- Printing a Report
- Saving a Report as a PDF File
- Saving a Report as a Text File

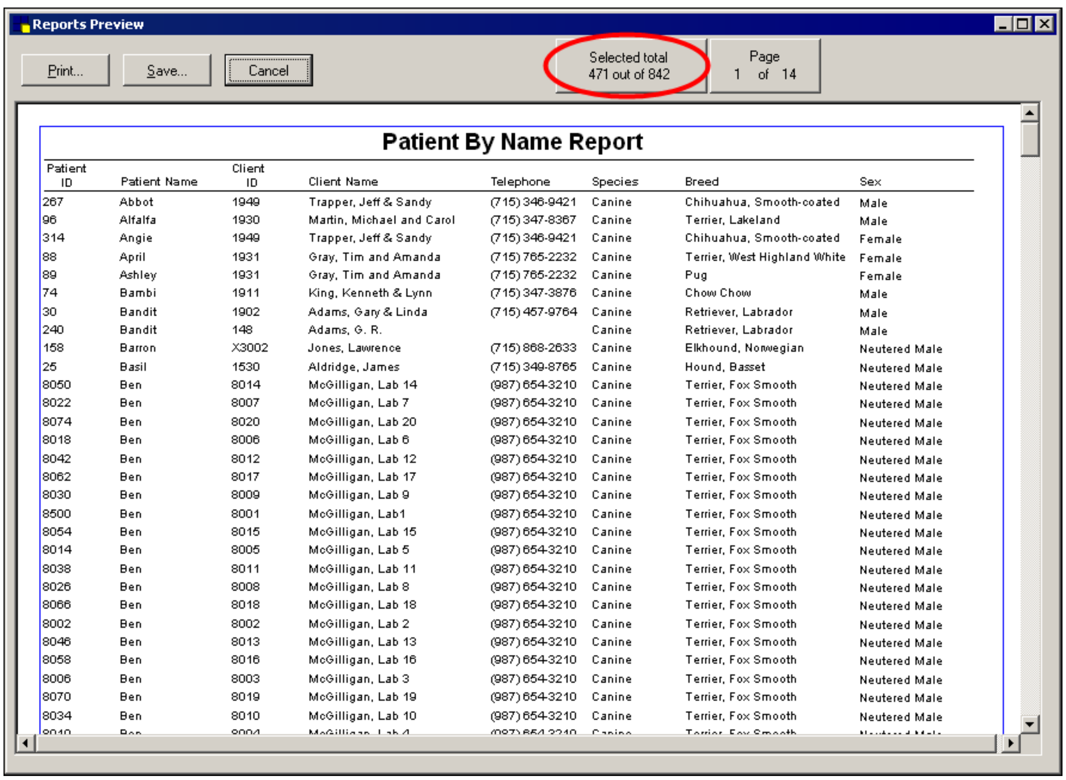


Report Output Overview

Cornerstone provides several different options for saving or printing reports. Once you have chosen a report from the Reports list, you must select your report output option (Preview, Print or Save As) before selecting the sort order and range that were discussed in the previous chapter.

Previewing a Report

The *Preview* option allows you to view the report on the screen before printing or saving it. This option is recommended, especially when running a report for the first time, to ensure that the report displays the desired results.



Patient By Name Report

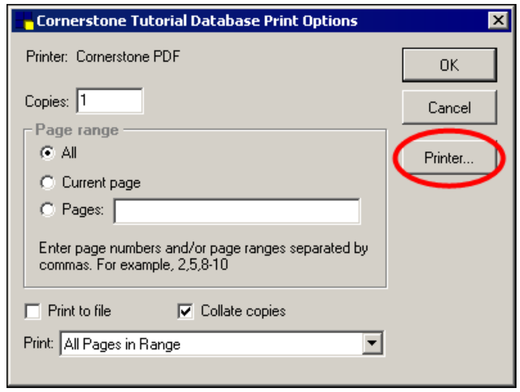
Patient ID	Patient Name	Client ID	Client Name	Telephone	Species	Breed	Sex
267	Abbot	1949	Trapper, Jeff & Sandy	(715) 346-9421	Canine	Chihuahua, Smooth-coated	Male
96	Alfalfa	1930	Martin, Michael and Carol	(715) 347-8367	Canine	Terrier, Lakeland	Male
314	Angie	1949	Trapper, Jeff & Sandy	(715) 346-9421	Canine	Chihuahua, Smooth-coated	Female
88	April	1931	Gray, Tim and Amanda	(715) 765-2232	Canine	Terrier, West Highland White	Female
89	Ashley	1931	Gray, Tim and Amanda	(715) 765-2232	Canine	Pug	Female
74	Bambi	1911	King, Kenneth & Lynn	(715) 347-3876	Canine	Chow Chow	Male
30	Bandit	1902	Adams, Gary & Linda	(715) 457-9764	Canine	Retriever, Labrador	Male
240	Bandit	148	Adams, G. R.		Canine	Retriever, Labrador	Male
158	Barron	X3002	Jones, Lawrence	(715) 868-2633	Canine	Elkhound, Norwegian	Neutered Male
25	Basil	1530	Aldridge, James	(715) 349-8765	Canine	Hound, Basset	Neutered Male
8050	Ben	8014	McGilligan, Lab 14	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8022	Ben	8007	McGilligan, Lab 7	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8074	Ben	8020	McGilligan, Lab 20	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8018	Ben	8006	McGilligan, Lab 6	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8042	Ben	8012	McGilligan, Lab 12	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8062	Ben	8017	McGilligan, Lab 17	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8030	Ben	8009	McGilligan, Lab 9	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8500	Ben	8001	McGilligan, Lab1	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8054	Ben	8015	McGilligan, Lab 15	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8014	Ben	8005	McGilligan, Lab 5	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8038	Ben	8011	McGilligan, Lab 11	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8026	Ben	8008	McGilligan, Lab 8	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8066	Ben	8018	McGilligan, Lab 18	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8002	Ben	8002	McGilligan, Lab 2	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8046	Ben	8013	McGilligan, Lab 13	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8058	Ben	8016	McGilligan, Lab 16	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8006	Ben	8003	McGilligan, Lab 3	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8070	Ben	8019	McGilligan, Lab 19	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male
8034	Ben	8010	McGilligan, Lab 10	(987) 654-3210	Canine	Terrier, Fox Smooth	Neutered Male

If you choose to preview a report, you can see how many records the report contains by looking at the *Selected total*. You can use this information to determine if you have made the range selections properly. For example, the *Patient by Name Report* displayed to the right was set to display all Canines. The *Selected total* indicates that there are 471 Canines, out of 842 patients at this clinic.

Using the preview option also allows you to see how many pages the report will be when printed, indicated in a box in the upper right hand corner of window. The example above (all Canines) resulted in a 14-page report.

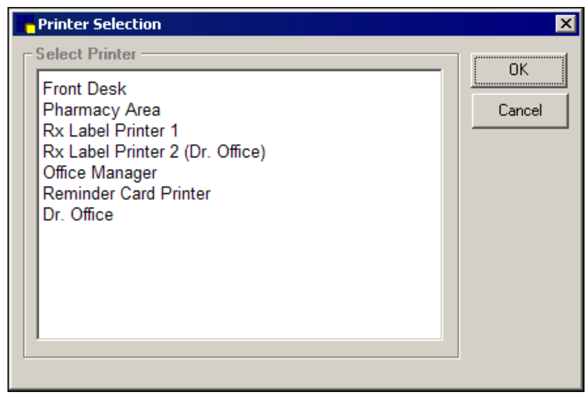
Printing a Report

This output option prints the report directly to a printer, without the option to preview it first. The *Print Options* window displays once you have selected your desired sort order and range. Here you can set the number of copies, specify a page range, and choose an alternate printer if you do not want this report to print to the default printer.



Changing the Printer Selection:

1. Click the **Printer...** button.



2. The *Printer Selection* window displays the printers available from this computer. Select the desired printer from the list and click **OK**.

Saving a Report as a Cornerstone PDF

The **Cornerstone PDF** printer option converts a report to a .pdf file (portable document format). Use of the Cornerstone PDF feature allows you to save a report as a file and retain its format, so the document can be used with other software and as an e-mail attachment.

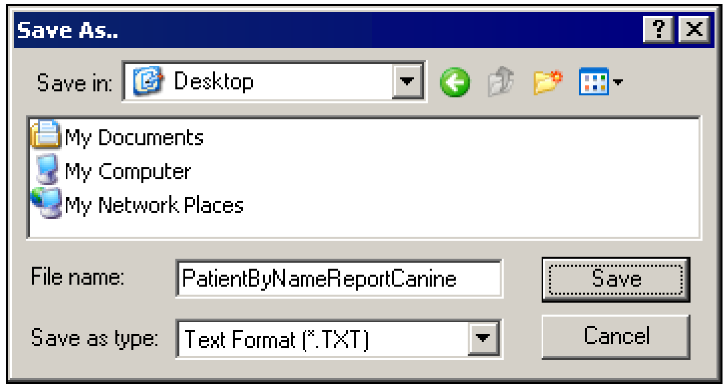
To Save a Report as a Cornerstone PDF:

1. On the *Reports* list select the desired report.
2. Click **Print**.
3. Complete the Sort Order and Range following the guidelines you learned in Chapter 1.
4. Click **OK**.
5. The *Print Options* window displays. Click the **Printer…** button
6. Select **Cornerstone PDF** and click **OK**.
7. The *Save As..* window displays.
8. Click the drop-arrow in the *Save in* field to select the location for the saved report, or leave the default location set to Desktop. You will need to remember this location when you want to retrieve the file later for merging or importing into another software program.
9. Press **Tab** twice to move to the *File name* field and enter a name for the report (ex. "Patient By Name Report").
10. Click **Save**.

Saving a Report as a Text File

The *Save As* print option allows you to specify a file name and location to which to save the report as a text file. This option does not allow you to preview the report and does not retain the format that you see in the preview screen. The resulting text file is in comma-delimited format, which is useful for exporting information to be used in other software products (ex. Microsoft* Word, Microsoft* Excel, QuickBooks*, etc).

To save a report as a text file:



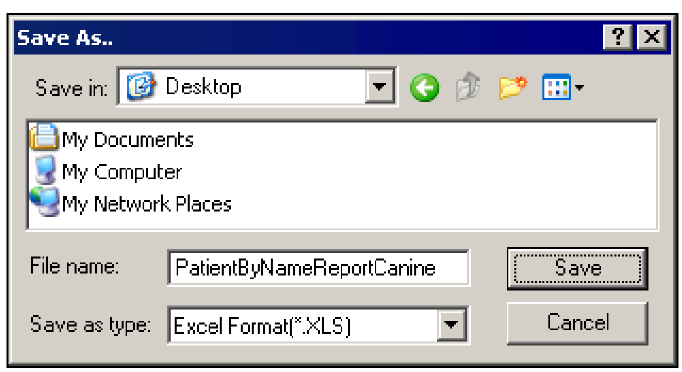
1. On the *Reports* list select the desired report.
2. Click **Save As**.
3. Complete the Sort Order and Range following the guidelines you learned in Chapter 1.
4. Click **OK**. The *Save As..* window displays.
5. Click the drop-arrow in the *Save in* field to select the location for the saved report, or leave the default location set to Desktop. You will need to remember this location when you want to retrieve the file later for merging or importing into another software program.
6. Press **Tab** twice to move to the *File name* field and enter a name for the report (ex. “All Canines”).
7. Verify the *Save as type* field is **Text Format (*.TXT)**
8. Click **Save**.

Saving a Report as an XLS (Excel Format) File

The *Save As* print option allows you to specify a file name and location to which to save the report as a .xls file. This option does not allow you to preview the report and does not retain the format that you see in the preview screen.

To save a report as a .xls file:

1. On the *Reports* list select the desired report.
2. Click **Save As**.
3. Complete the *Sort Order* and *Range*.
4. Click **OK**. The *Save As..* window displays.
5. Click the arrow in the *Save in* field to select the location for the saved report, or leave the default location set to Desktop. You will need to remember this location when you want to retrieve the file later for merging or importing into another software program.
6. Press **Tab** twice to move to the *File name* field and enter a name for the report (ex. “All Canines”).
7. Verify the *Save as type* field is **Excel Format (*.XLS)**
8. Click **Save**.



Chapter Summary

You learned these important concepts within this chapter:

- **Reports Overview** – Report Search window elements, how the Search field works, how to restart or reset your search and what locked reports mean.
- **Report Selection** – How to use the Sort Order for report appearance and how to use Sort Range to effectively filter data.
- **Report Output** – Learn how to preview a Report, print a Report, save a report as a PDF File, save a report as a text file.

Chapter 2: Time Clock

You'll learn these important concepts within this chapter:

- **Using Time Clock: Staff** – The basic fundamentals of Time Clock functionality that the staff uses.

USING TIME CLOCK: STAFF R M

Time Clock is a very basic time keeping feature that requires users to manually clock in and clock out (punch in/out). This lesson will show you how complete these tasks in Time Clock: log in, log out, clock in and clock out. There are just a couple of administrative setup duties to be completed before you can use the Time Clock features. Default settings for Time Clock can be located in the *Designated Staff and Management Training Guide*.

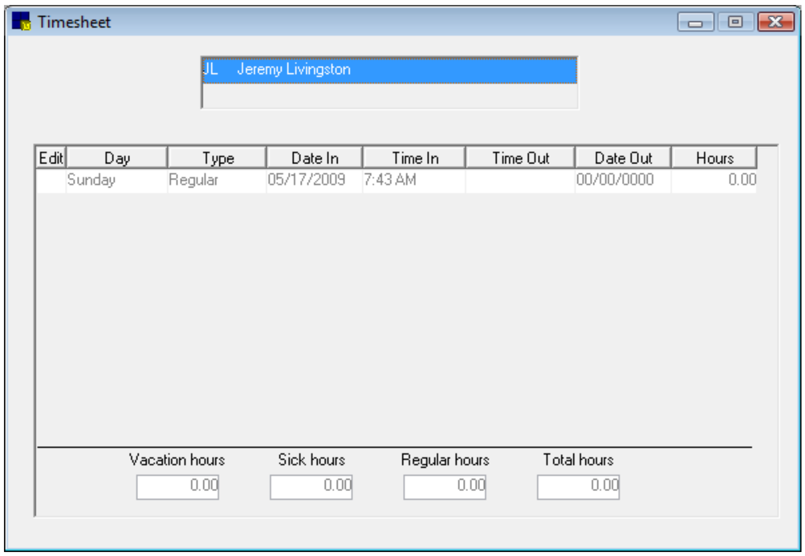
TRAINER-LED DEMONSTRATION AND EXPLANATION

Quickly clock in and clock out using Cornerstone Time Clock.

Clocking In:

When you are ready to clock in for the day:

1. On the desktop, double click the **Time Clock** shortcut.
2. Enter your User name and/or Password and click **OK**. **[enter you assigned password]**
3. Click the **Clock In** toolbar button.
4. Close the *Timesheet* when you are finished clocking in by clicking the **X** in the upper right corner of the *Timesheet* window.
5. Press **Ctrl** + **L** or click the **Password Entry** toolbar button and leave the screen as it is or close *Time Clock* by clicking the **X** in the upper right corner of the window.

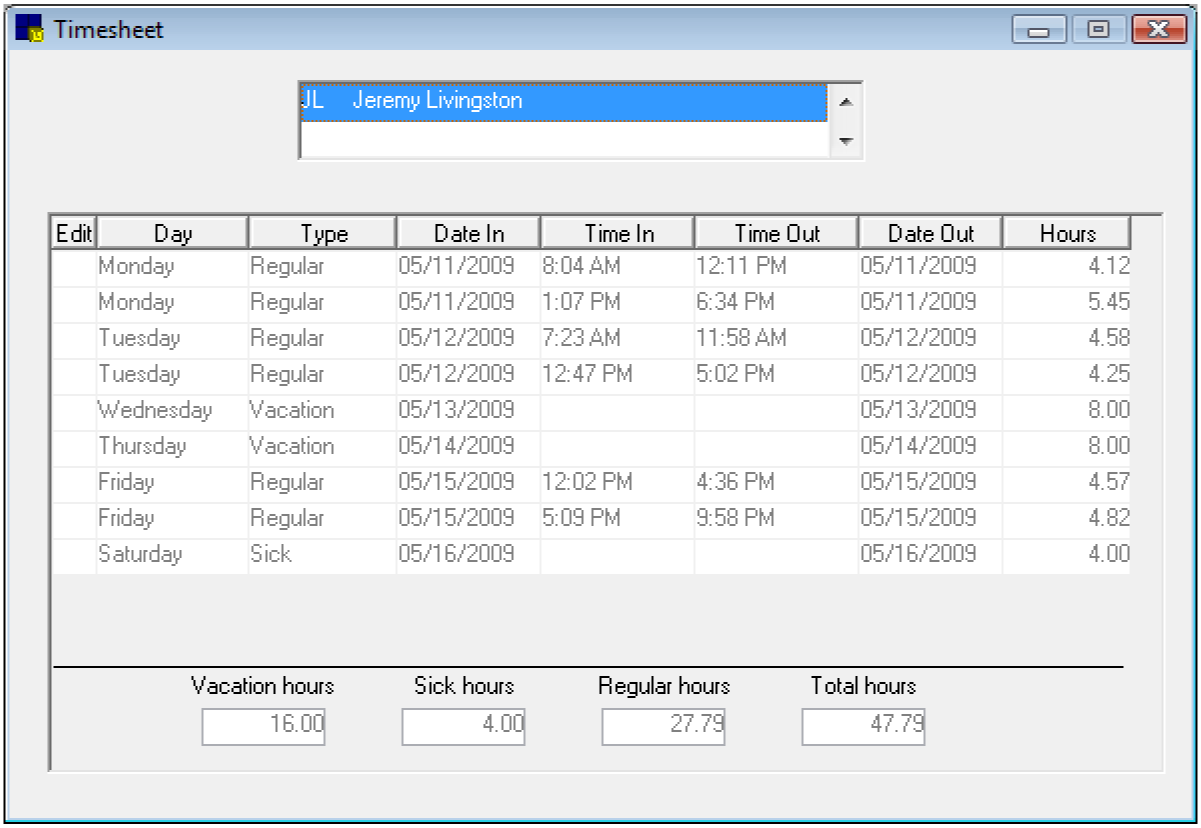


Clocking Out:

When you are ready to clock out for lunch or the end of the day:

1. If *Time Clock* is open, click the **Password Entry** toolbar button and enter your password.
   - If you have clocked in properly, the **Clock Out** toolbar button will be available. If you have not clocked out properly, the **Clock Out** toolbar button will be gray.
   - Click the **Clock Out** button.
   - Press **Ctrl** + **L** or click the **Password Entry** button and leave the screen as it is or close *Time Clock* by clicking the **X** in the upper right corner of the window.
2. If *Time Clock* is closed, open *Time Clock* by double clicking on the **Time Clock** shortcut or accessing it from the **Start** menu.
   - If you have clocked in properly, the **Clock Out** toolbar button will be available. If you have not clocked out properly, the **Clock Out** toolbar button will be grey.
   - Click the **Clock Out** button.
   - Press **Ctrl** + **L** or click the **Password Entry** button and leave the screen as it is or close *Time Clock* by clicking the **X** in the upper right corner of the window.

A time sheet with several clock in and clock outs as well as vacation and sick time recorded might look like this:



Edit	Day	Type	Date In	Time In	Time Out	Date Out	Hours
	Monday	Regular	05/11/2009	8:04 AM	12:11 PM	05/11/2009	4.12
	Monday	Regular	05/11/2009	1:07 PM	6:34 PM	05/11/2009	5.45
	Tuesday	Regular	05/12/2009	7:23 AM	11:58 AM	05/12/2009	4.58
	Tuesday	Regular	05/12/2009	12:47 PM	5:02 PM	05/12/2009	4.25
	Wednesday	Vacation	05/13/2009			05/13/2009	8.00
	Thursday	Vacation	05/14/2009			05/14/2009	8.00
	Friday	Regular	05/15/2009	12:02 PM	4:36 PM	05/15/2009	4.57
	Friday	Regular	05/15/2009	5:09 PM	9:58 PM	05/15/2009	4.82
	Saturday	Sick	05/16/2009			05/16/2009	4.00

Vacation hours	Sick hours	Regular hours	Total hours
16.00	4.00	27.79	47.79

Chapter Summary

You learned these important concepts within this chapter:

- **Using Time Clock: Staff** – The basic fundamentals of Time Clock functionality that the staff uses.

Chapter 3: Boarding & Grooming

You'll learn these important concepts within this chapter:

- **Reservations** – Create a single pet reservation, create a multiple reservation and create a multiple pet reservation where the pets are sharing a cage.
- **Check-In Reservations** – Check in a boarding reservation.
- **Boarding & Grooming – Beyond the Basics** – Delete a reservation, create a recurring boarding reservation, access the reservation book, block a cage and print/preview a boarding report.

RESERVATIONS

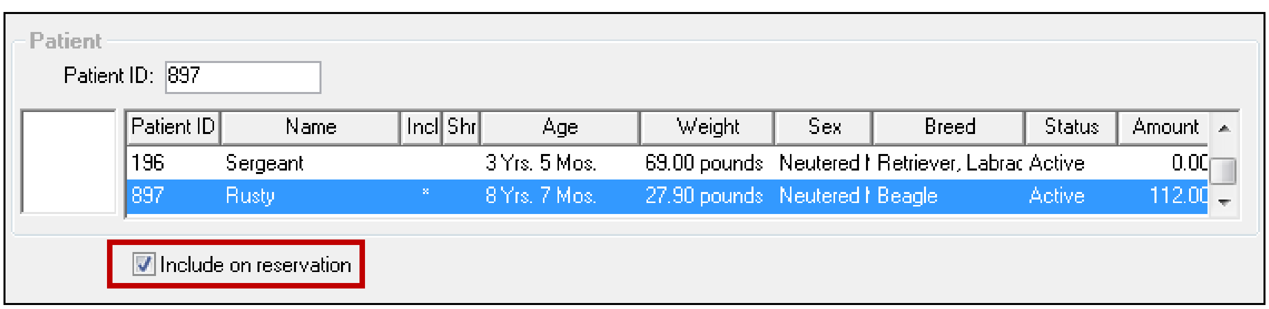
This lesson will illustrate how to access the Boarding and Grooming features, introduce the *Reservation List* window as well as show you how to create reservations (single animal reservations and multiple animal reservations) within Boarding and Grooming. There are several set up tasks that need to be performed by an administrator prior to properly using the Boarding and Grooming features.

TRAINER-LED EXPLANATION

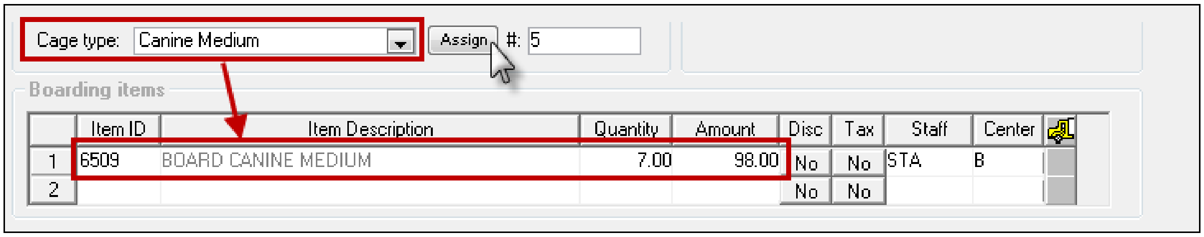
Access the Reservation List and create reservations using Boarding & Grooming including: single pet, multiple pet and multiple pet reservations where the pets are sharing a cage.

Scheduling a Single Pet Reservation

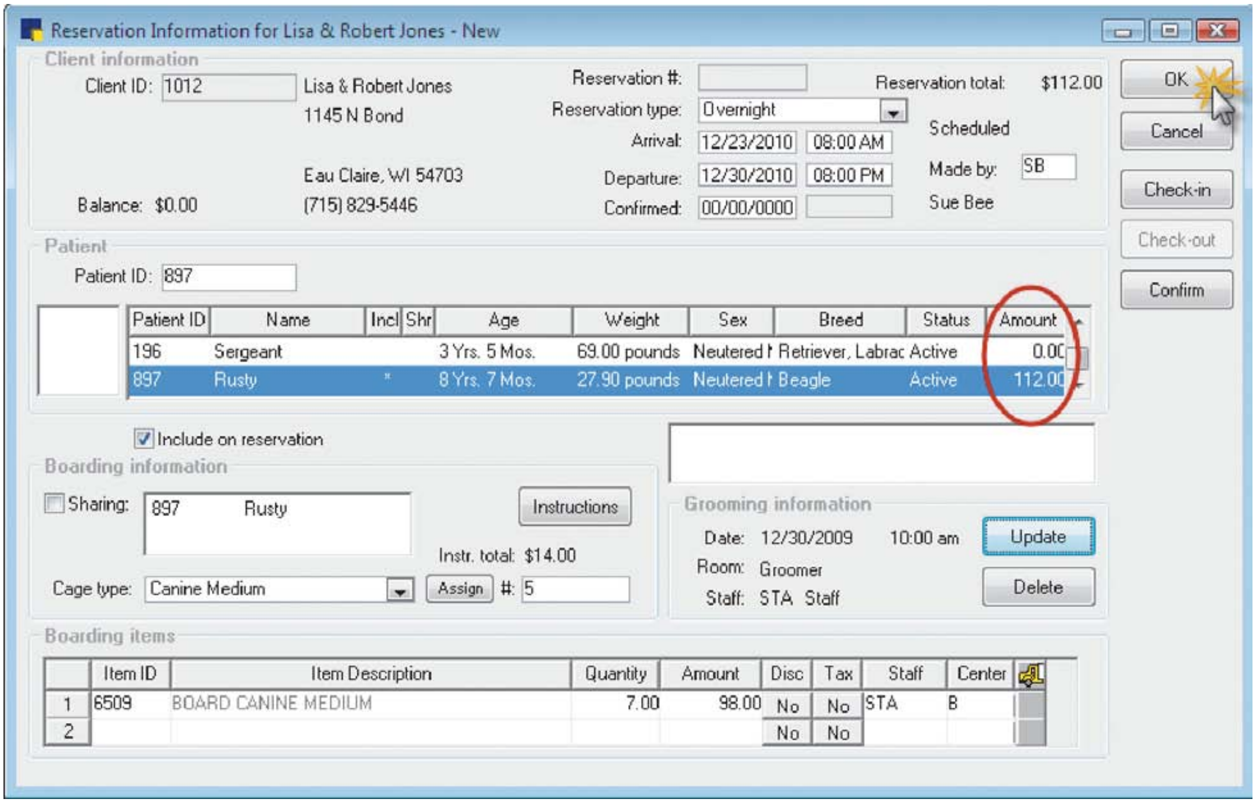
1. From the *Reservation List*, click **New**. Type the **Client ID** in the *Client ID* field and press **Tab** (press **F2** in the *Client ID* field to search for and select the client if needed). **[If any Client alerts display, read and respond appropriately, then click OK. Once a client ID is selected, the personal information and A/R information will display. Patients belonging to the client will appear in the Patient section.]**
2. **Tab** through the *Reservation #* field. **[Press Tab and the system will automatically assign a Reservation number. The number does not appear until the reservation is saved. A message will display if the client has any reservations currently scheduled to ask if you would like to schedule a new reservation. Press F2 to view previously scheduled reservation information for the client.]**
3. In the *Reservation type* list click the **down arrow** to view the reservation types; select a *Reservation Type* for this reservation.
4. Enter the **Arrival Date**.
5. Enter the **Arrival Time**.
6. Enter the **Departure Date.**
7. Enter the **Departure Time**.
8. Optional: Enter the date/time the reservation is confirmed.
9. Type the **staff ID** of the person who made the reservation in the *Made By* field. Press **F2** to search for and select a staff member, if needed.
10. In the *Patient* area, select the patient, for whom you want to make the reservation. Press **F2** in the *Patient ID* field to search for and select the patient, if needed.
11. Click the **Include on Reservation** check box. [If any *Patient alerts* display, read and respond appropriately, then click **OK**.]



12. Check the *Reminder information*.
13. Select the Cage Type from the *Cage type* list. Colors indicate that a portion of the available cages are already booked. A cage type with the corresponding reservation type must be selected; if not, a popup message displays.

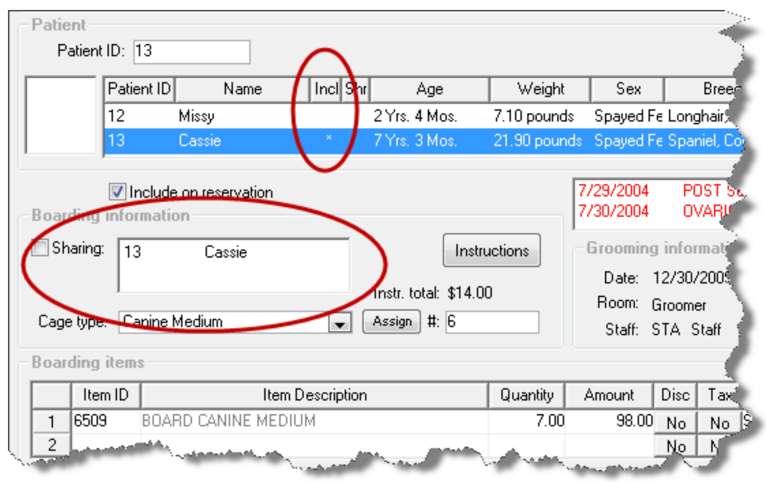


14. Optional: Click the **Assign #** button. **[Click Assign to assign the first available cage to a pet. Press F2 in the *Assign #* field to view the *Reservation Book* which displays the cages available. Highlight the cage to use for the reservation and press Schedule. Cages may be assigned when placing the reservation or when checking in the pet.]**
15. Click the **Instructions** button. **[Enter reservation notes, equipment notes and other types of instructions (feeding, exercise, medication, etc.) when creating the reservation or checking in the pet. You can view instructions associated with a specific reservation type. Click View History to view or transfer instructions from a prior stay. If more than one reservation date is listed, highlight the appropriate date and instruction and press Transfer. All boarding instruction information from the selected reservation will be transferred, except the *Beginning On date*, for feeding, exercise, medication, and other items. The *Beginning On date* will be changed to the arrival date for the current reservation. The blue text line below each instruction item is used to free-form type any notes or special instructions pertaining to this item; these notes will print on the *Daily boarding feeding list, Boarding exercise list, Boarding combination list, or Boarding other services list* depending on the type of invoice item. To delete an instruction, press CRTL + D.]**
16. To enter **Grooming information** click **Add**.
17. If you are **not** using **Appointment Scheduler:** Fill out the *date*, *Staff*, *time units*, and any *notes*. **[This information will print on the *Grooming Report*.]**
18. If you **are** using **Appointment Scheduler:** Select the *Reason for Visit,* fill out the *Time units* and *Staff*, select the **Staff ID** that will provide the service **OR** select **Any Staff** from the list, enter the **Prefix**, enter the Amount, Select the **Staff Time**, enter *Notes* or pertinent information for the grooming appointment, enter in any ***Appointment Items***, optional: Click **Find** (Fill out the necessary search criteria and click **Search**. Select an appointment date/time and select **Schedule**.), optional: Click Grid (Double-click the desired time slot. To save, click the **Save current view** button. Each login under this user ID will display the custom changes. To reset defaults, click the **Reset default view** button.).
19. Enter *Boarding Items*. **[If you linked your charges to each cage type the charge will automatically display. If you did not link your charges or charge by weight you will have to manually enter in the Item ID. If charging by weight: A miscellaneous service item may be set up as a Day Counter; Line one – Displays the Day Counter ID and quantity; Line two - Select the Item ID for the correct weight of the pet, observe the quantity listed for the Day; At the end of the boarder's stay update the quantity of the pet's stay (for the item on Line two) and delete the Day Counter item on Line one. Additional boarding items can be added. These items are transferred to the *Patient Visit List* upon check-out. Delete an invoice item by highlighting the Item ID, press CRTL + D. The *Patient Amount* Column represents the Total Due. The instructions total and boarding items amount total comprises the fee in the *Patient Amount column*. (This column includes taxes and discounts, if applicable.)]**



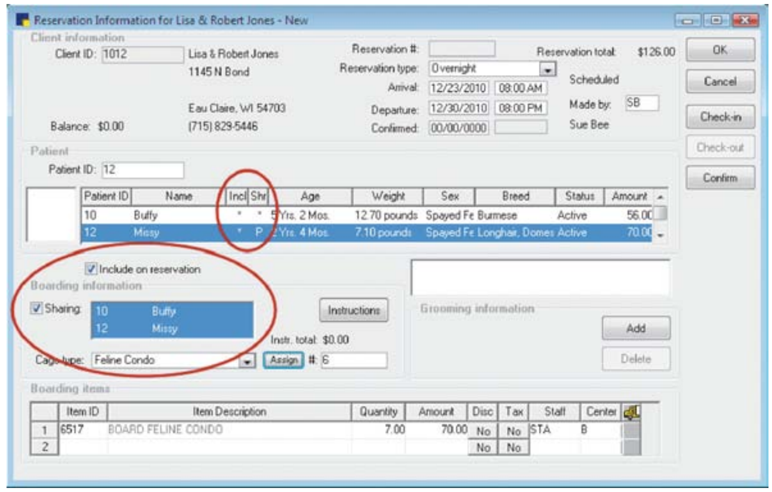
Scheduling a Multiple Pet Reservation

1. Complete Steps 1 – 19 found in the Single Pet Reservation steps.
2. If the pet will have its own case, select the next **patient** for which you are making the reservation.
3. Click the **Include on Reservation** check box.
4. Complete Steps 12 – 19 Single Pet Reservation
   Directions.
5. Continue this cycle for all pets.
6. Click **OK**.

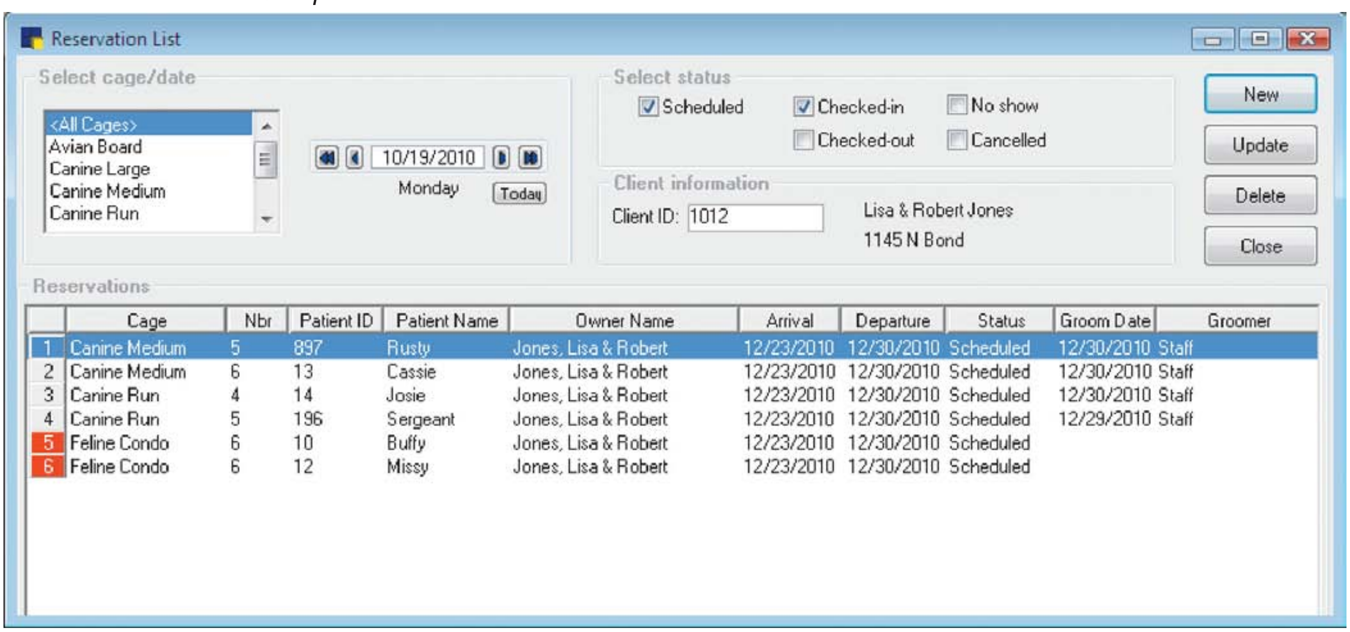


Scheduling a Multiple Pet Reservation where pets are sharing a cage

1. Complete Steps 1 – 19 found in the Single Pet Reservation steps.
2. If pets will share a cage, select the first **patient** you want to make the reservation for.
3. Click the **Include on Reservation** check box.
4. Complete Steps 12 – 19 Single Pet Reservation steps.
5. Continue this cycle for all pets sharing the cage.
6. Check the **Sharing** check box.
7. In the *Sharing* list box, highlight each pet that will share the same cage with the primary pet.
8. Click **OK**.



Reservation List with Completed Reservations



Check-in Reservations

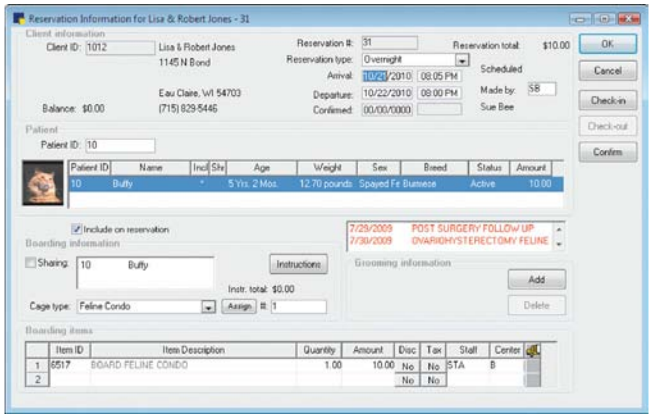
This lesson explains checking in boarding reservations. It also explains the process of checking out boarding reservations and checking in and out grooming reservations. There are several setup tasks that have to be performed by an administrator prior to properly using the Boarding and Grooming features.

TRAINER-LED EXPLANATION

Access the Reservation List and create check-in/out boarding reservations as well as grooming reservations.

Check-In Boarding Reservation

1. Select the **Boarding and Grooming** (Red doghouse) icon to access the *Reservation List* window; select the reservation that needs to be checked-in.



2. Click **Update** to check in a reservation.
3. Optional: Review the reservation information and make any necessary changes to the *Reservation type, Arrival, Departure* dates, *Cage types, Instructions, Grooming information* and/or add any additional *Boarding items*.
4. Click **Check-in**. **[The *Boarding Check-In Report* will print.]**
5. Optional: If correspondence windows display, read and respond appropriately, then click **OK**.
6. If you have a correspondence document linked to your boarding invoice items, it will automatically generate and print. **[For example, you may link your *Boarding Release Form* to your boarding charges. A sample *Boarding Release Form* is shown here.]**

Check-out Boarding Reservation

- Check out a boarding reservation prior to invoicing so that the boarding fees are added to the *Patient Visit List* and can then be transferred to the invoice
- It is possible to check out a reservation while invoicing and then revisit the *PVL* to transfer the boarding fees to the invoice
- Hotel-style reservations cannot be checked in and checked out on the same day
- Check out a reservation up to 3 days after the patient has departed the practice

Check-in/Check-out Grooming Reservation

- Grooming appointments can be checked-in from the *Appointment Scheduler*
- Grooming appointments are automatically checked out when an invoice is created and posted
- If the Grooming appointment from a Boarding Reservation is not checked out, when posting the invoice for the Boarding Reservation, a message will display to warn you
- Manually check out a grooming appointment through the *Census List* (**F3**) or the *Appointment Scheduler*

Boarding & Grooming: Beyond the Basics

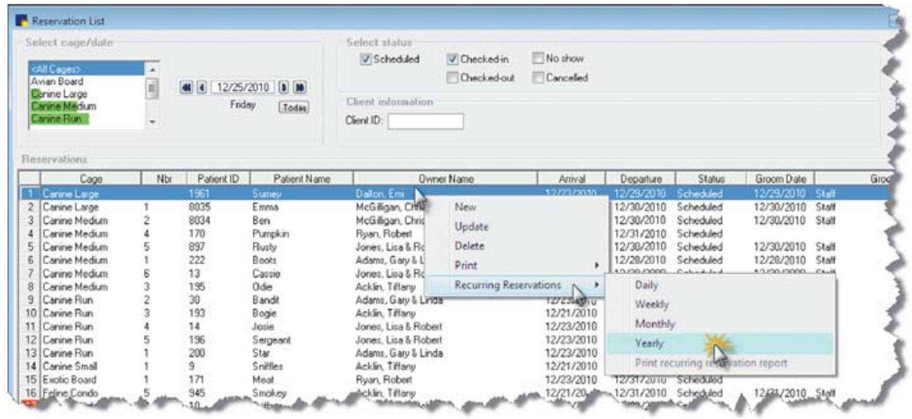
This lesson provides procedural steps for deleting reservations, setting up and deleting recurring boarding reservations, accessing and using the reservation book, blocking cages as well as previewing and printing various boarding reports and documents. There are several set up tasks that have to be performed by an administrator prior to properly using the Boarding and Grooming features. Information regarding the setup of Boarding and Grooming can be located in the *Designated Staff and Management Training and Setup Guide*.

TRAINER-LED EXPLANATION

Use Boarding & Grooming to complete additional reservation tasks such as: delete a boarding reservation, create a recurring reservation, delete a recurring reservation, access the reservation book, block boarding cages and print boarding and grooming reports.

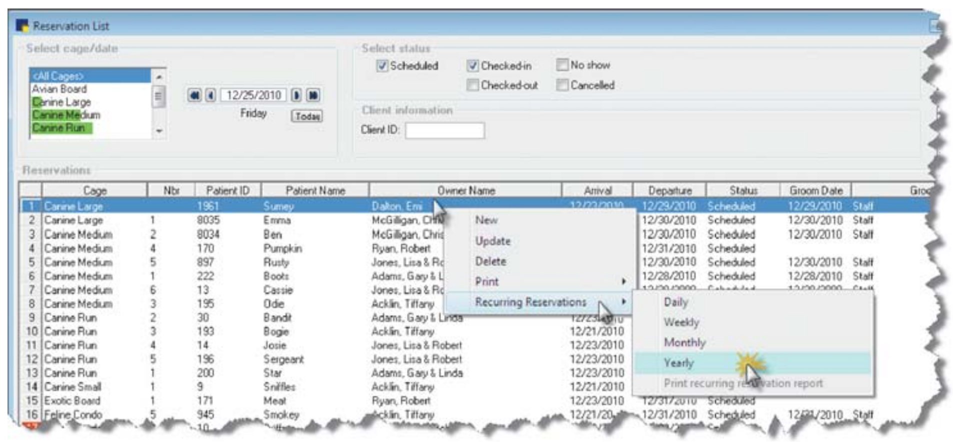
Delete Boarding Reservations

1. From the *Reservation List* window, right-click on the reservation you want to delete and click **Delete**. **[A checked-in Boarding reservation can be marked to Change Reservation to Scheduled to change it back to a reservation.]**



Recurring Reservations

1. From the *Reservation List* window, right-click on the reservation your want to make recurring, select **Recurring Reservations**.



2. Select the specific reservation recurring interval. **[Existing reservations can be set up to recur for the following intervals: *Daily*: Enter the number of days for which the reservation is to recur or select every weekday to recur reservations every day for one or more weeks. *Weekly*: Enter how often to recur a reservation in terms of weeks; Ex: to recur a reservation once every two weeks, type 2. Click in the appropriate check box to select the day of the week for the recurrence. *Monthly*: Enter the day of the month for the recurring reservation and the number of months for the recurrence or select the week of the month, the day of the week, and the number of months the reservation is to recur. *Yearly*: Select the month and the day for the reservation to recur or select the week of the month, the day of the week, and the month of the recurring reservation.]**
3. Click **OK**.
4. If a Grooming Appointment is included with the reservation, the recurring grooming appointments are placed in the *Appointment Scheduler* for the selected recurring dates and times and can be viewed in the *Schedule for Today*.
5. If a reservation or appointment cannot be created, a Reservation Recurrence Exception Report will automatically print, listing the date and reason the reservation or appointment could not be made. Some reasons include cages are full, the grooming appointment time is not available, or the reservation or appointment would occur when the practice is closed. See example below of the *Reservation Recurrence Report*,

Deleting a Recurring Reservations

1. To delete a Recurring reservation, select the reservation on the *Reservation list* and click **Delete**.
2. When deleting a Recurring Reservation, there are two options, select the option that applies. Options are: **Delete all occurrences** or **Delete this one** and then click **OK**.

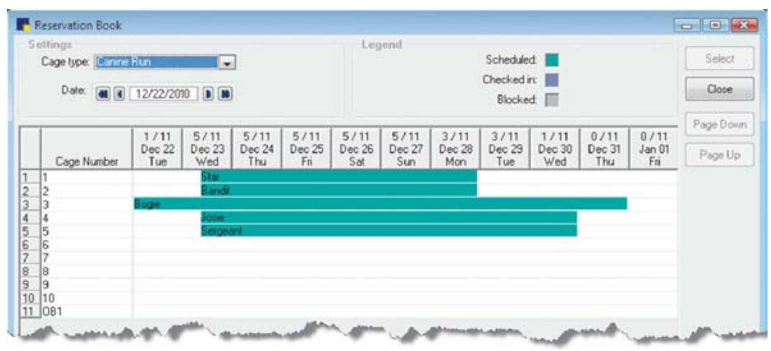
Reservation Book

*Uses for the Reservation Book: View which cages of a selected cage type are occupied and for which pet, scheduled for occupancy and for which pet, blocked or are available for occupancy for a selected date. Only available if the **Assign cage number** check box is checked in Boarding Defaults. Automatically updates when a reservation is scheduled, checked-in, checked-out, cancelled or when a cage is blocked.*

1. To access the *Reservation Book*, select **Activities** > **Boarding** > **Reservation Book**.
2. Select the **Cage type** you would like to view.
3. Select the start **Date** you want to view.

Blocking Cages

Cages may be *blocked so that reservations for that space are "marked" as unavailable. To enter a New block or Update an existing block, Select **Activities** > **Boarding** > **Block Cages**. Uses for blocking cages: Block cages while they are being cleaned or repaired; this will reduce the number of cages available during the designated time. If there is a reservation attached to the cage, it will not allow a block. The following message appears: This cage cannot be blocked.*



1. Click New or Update
2. Choose a *Cage Type*
3. Enter in a *Beginning Date* and *Time*
4. Enter in an *Ending Date* and *Time*
5. Enter in any *Notes* as to why the cage is being blocked, etc

Boarding and Grooming Reports

1. Boarding Feeding List
   - Use the *Boarding Feeding List* to view a list of feeding requirements for checked-in patients on a specified date.
2. Boarding Exercise List
   - Use the *Boarding Exercise List* to view a list of exercise requirements for checked-in patients on a specified date.
3. Boarding Medication List
   - Use the *Boarding Medication Lis*t to view a list of medication requirements for checked-in patients on a specified date.
4. Boarding Combination List
   - Use the *Boarding Combination Lis*t to view a list of feeding, exercise, medication and other services for checked-in patients on a specified date.
5. Boarding Census
   - Use the *Boarding Census* report to view a list of patients by status (cancelled, checked-in, checked-out, no show, scheduled or all) for a selected date.

6. Boarding Expected Check-ins
    - Use the *Boarding Expected Check-ins* report to view a list of reservations made for a specified date. Patients due to be checked in prior to the specified date will also print on the report. If the patient has overdue reminders or no reminders entered into the system, a red R in a red box will be shown next to the patient's arrival date.
7. Boarding Expected Check-outs
    - Use the *Boarding Expected Check-outs* report to view a list of patients expected to check out on a specified date. Patients due to be checked out prior to the specified date will also print on the report.
8. Boarding No Shows
    - Use the *Boarding No Shows* report to view a list of boarding reservations no-shows within a specified date range. For a reservation to appear on the report it must be deleted and *No Show* must be selected as the reason it was deleted.
9. Boarding Cancelled List
    - Use the *Boarding Cancelled List* to view a list of boarding reservations that have been cancelled within a specified date range. For a cancelled reservation to appear it must be deleted and *Cancelled* must be selected as the reason it was deleted.
10. Other Services List
    - Use the *Other Services List* to view a list of boarding items classified as Other Services for checked-in patients on a selected date.
11. Boarding Occupancy Forecast
    - Use the *Boarding Occupancy Forecast* report to view a list of the number of cages that are scheduled to be occupied for a selected range of dates. This report is useful when planning staff scheduling.
12. Grooming Report
    - Use the *Grooming Report* to view a list of grooming appointments for the day or for a range of dates.
13. Reservation Recurrence Exception
    - The *Reservation Recurrence Exception* report automatically prints when one or more reservations or grooming appointments in the recurring series cannot be created for a future date.
14. Reservation Recurrence
    - The *Reservation Recurrence* report is a historical report that lists all of a patient's past and future recurring reservations (right-click on the **Recurring Reservation** > **Recurring Reservation** > *Print recurring reservation* report).
15. Scheduled Reservations
    - Use the *Scheduled Reservations* report to view a list of all of a patient's future scheduled reservation, including future recurring reservations (right-click on the reservations > **Print** > **Scheduled Reservations**).

Chapter Summary

You'll learn these important concepts within this chapter:

- **Reservations** – Create a single pet reservation, create a multiple reservation and create a multiple pet reservation where the pets are sharing a cage.
- **Check-In Reservation** – Check in a boarding reservation.
- **Boarding & Grooming – Beyond the Basics** – Delete a reservation, create a recurring boarding reservation, access the reservation book, block a cage and print/preview a boarding report.

Basic Foundation: Section 5

Practice Exercises

Cornerstone* 8.1 Basic Foundation Training Guide • Practice Exercises • Page 124 •

Practice Exercises R M M

Instructions: Do only the exercise that is appropriate for your team. Complete the exercises in order, not skipping any, as some exercises build upon each other. Each learner should complete the practice exercises individually in the *Cornerstone Tutorial Training Files*. When dates are used, your system will default to the current date; accept that date unless otherwise directed.

To access the Training Files, click…

Start > **All Programs** > **Cornerstone** > **Training Files** > **Cornerstone Tutorial**

User Name: **No username**; *Password:* **[CS]**

Section 1: First Things First

1. Log into Cornerstone. **[use your assigned password]**
2. If you have not already done so, customize a Kimberly Adams account and make it your demonstration client (there are 50 Kimberly Adams accounts) **[Customize a Kimberly Adams account to make it your demonstration client/account.]**

Section 2: Patient Visit

1. Schedule an appointment for your patient. **[Appointment details: your Barksalot, today, one hour from now for Senior Wellness Exam with vaccinations and follow up services for his bladder issues. Add an appointment item: toothpaste for dogs; do not select the 'Transfer invoice items to Patient Visit List now' check box.]**
2. Move the appointment you just made for the patient. **["Overflow" column 1 hour later than originally scheduled]**
3. Check the patient in. **[From the appointment schedule, check Barksalot in as an outpatient add document 379 at check-in, when prompted, view/preview that report. Do not print.]**
4. Preview the *Check-in Report*. **[Locate your Barksalot's Check-in Report and preview it; do not print.]**
5. View the *Census List* to see that your patient is checked in. **[View your Barksalot on the Census List.]**
6. Select the *Daily Planner* 's *Appointments* tab and view appointments. **[view the appointment for your Barksalot]**
7. Open a Medical Note and enter a Weight value for the patient.
   - 7.1 **[In the 'Wellness Exam' medical note, enter a weight for Barksalot 68 pounds (Normal). Document staff = C. Schulze, DVM; Weight staff = you]**
   - 7.2 **[In the 'Wellness Exam' medical note, use the *Vital signs hyperlink* to add the values listed below.]**
     - **Body Score = 5 Ideal 5**
     - **Temp = 102.6 H**
     - **Pulse = 190.0 H**
     - **Resp = 40 H**
     - **MM = Pink/Healthy**
     - **CRT = <2 sec**
     - **Dental = 3 Moderate H**
     - **Pain = 2 Mild Pain H**
8. Complete the history section of the patient's medical note. **[For your Barksalot, select Tartar, Calculus and Periodontal Disease Stage 3/4 for Mouth/Teeth/Gums. Save as tentative for later editing.]**

   Note: In preparation for today's appointment, Barksalot's Senior Wellness estimate has already been finalized and is stored in his patient file.

9. Review and modify the items on the *Patient Visit List*.
    9.1 Act on the duplicate items **[For one of each of the Snap 4Dx and Examinations - delete or mark as *Declined*.]**
    9.2 Decline an item to history. **[Decline to history = Lyme Disease Booster. Add note on the blue line that Mr. (or Ms.) Adams declines.]**
10. Add a prescription item to the *Patient Visit List*.
    10.1 Add item. **[Patient = your Barksalot. Item = Methigel 4.25oz . Use this text for the prescription instruction = "Please sprinkle 1 teaspoon on pet's food daily. Discontinue C/D diet and return Barksalot to Science Diet Canine Senior."]**
11. From the Patient Clipboard, create and finalize a new estimate for the patient.
    11.1 **[Patient = Barksalot; estimate for "Bladder Surgery"; estimate contains the items below.]**
    - **Bladder Sx Group (Cystotomy) (this will load numerous items based on species and weight)**
    - **Buprenex (Buprenorphine) 0.3mg/ml @ 0.34 qty**
    - **Amoxicillin Injectable @ 3.4 qty**
    - **Rimadyl injectable @ 1.36 qty**
    - **Buprenorphine Oral @ 2.44 qty - To be prescribed to go home: Please give 0.61ml (1 syringe) orally every 8 hours as needed for pain. There is an individual syringe for each dose, 4 individual doses in total.**
    - **Pick Rimadyl 100mg @ 5 qty - To be prescribed to go home: Please give ½ tablet every 12 hours with food.]**

    11.2 **[Finalize Barkalot's estimate.]**
12. Review the patient's vitals history. Enter a new set of vitals**. [Respiration of 36 (High) and Temperature of 102.8 (High)]**
13. Admit the patient to the hospital and create Patient Orders. Complete the treatments and change the patient's status to **Ready to go home**.
    13.1 **[From the Patient Clipboard, select *Electronic Whiteboard* and select *Patient Orders*. Create Whiteboard patient orders by transferring items from the PVL (to be completed 'one time' unless otherwise noted)**
    - **Electrocardiogram-diagnostics**
    - **Estimate Radiographs-diagnostics**
    - **Ultrasound guided Cysto-diagnostics**
    - **Urinalysis-diagnostics**
    - **CBC-diagnostics**
    - **Catalyst 15-diagnostics**
    - **Vetstat Electrolytes-diagnostics**
    - **Snap 4Dx-diagnostics**
    - **Tonometry-diagnostics**
    - **Blood Pressure-diagnostics**
    - **DA2P/CPV-treatment [assign start time 2 hours after current time for all vaccinations]**
    - **Bordetella-treatment**
    - **Rabies-treatment**
    - **Fecal-diagnostics**
    - **Anesthesia-treatment**
    - **Anesthesia Additional-treatment**
    - **EKG Monitor-(continuous) treatment - duration for 2 hours**
    - **Cystotomy-treatment**
    - **Radiographs (these will be post op)-diagnostic**
    - **Crystal stone analysis-diagnostic**
    - **Urine Culture & MIC**
    - **Fluids administration**
    - **Buprenex (BID, prn)-medication**

- **Amoxicillin (BID)-medication**
- **Rimadyl Injectable (BID)-medication**
- **Hospitalization-daily care**
- **Add additional Non Billable treatments for TPR monitor (Start time, 1 hour from start of this exercise. Continuous for a duration of 12 hours)**

13.2 **[Complete the patient treatments.]**

13.3 **[Change patient status to 'Ready to go home'.]**

14. Record a medical note for the patient. **[From your Barksalot's *Patient Clipboard*, navigate to the Bladder Surgery medical note; Staff = C. Schulze, DVM. Add this information then Save.**
    - **Procedure: Cystotomy**
    - **Approach: Midline, according to clinic policies and protocols**
    - **Closure - 3-0 Ethicon Body Wall & Subcutaneous, Staples for skin**
    - **Assessment: Routine bladder surgery and removal of numerous smooth stones ranging in size from < 0.25cm - 4 cm. Flushed bladder with warmed normal saline. Plan to submit for crystalographic analysis and culture.**
    - **Number removed = +50]**

    14.1 Update the medical note. **[Update the Bladder Surgery medical note and finalize it.]**

    14.1.1 Add a note to finalized bladder surgery medical note. **[note = Patient recovery uneventful]**

    14.2 Prescribe a medication for the patient. **[Patient = your Barksalot; medication = Cephalexin 500mg capsule. Qty = 28; Instruction = Please give one capsule every 12 hours for 14 days.]**

15. Process the invoice. **[Pay total amount with Check # 8844; Cashier Password = your assigned cashier password.]**

16. Make a payment and add a comment for a client.

    16.1 **[payment = $10 cash for Greg Altman's account]**

    16.2 **[comment = Call each month to remind payment is due. (enter your initials)]**

Basic Foundation: Section 6

Appendix

Appendix

Documents included in the *Appendix* are:

- Startup Procedures
- Shut down Procedures
- Starting the Cornerstone Database
- Function and Shortcut Keys
- Patient Visit Workflow
- Laboratory Workflows
- Imaging Workflow
- Medical Note Templates Per Visit Type
- Correct Invoices or Return Items
- Correct Payments
- Process End of Day

Start Up Procedures

On the Server:

There are two types of servers: dedicated and peer-to-peer. Below you will find directions for logging onto each type of server. Follow the directions for the type of server you have in your practice.

If you have a Dedicated Server running Windows* 2003

1. Turn on your server and monitor.
2. When the *Welcome to Windows* screen displays press **Ctrl** + **Alt** + **Delete**.
3. When the *Log On to Windows* screen displays, enter the following:
    - User Name: **Administrator**
    - Password: **Idexx123**
4. Click **OK** to continue logging in.

If you have a Non-Dedicated Server

1. Turn on your server and monitor.
2. When the *Welcome to Windows* screen displays press **Ctrl** + **Alt** + **Delete**.
3. When the *Log On to Windows* screen displays, enter the following:
    - User Name: **Staff**
    - Password: **No Password**
4. Click **OK** to continue logging in.

If you have a Dedicated Server running Windows* 2000

1. Turn on your server and monitor.
2. When the *Welcome to Windows* screen displays press **Ctrl** + **Alt** + **Delete**.
3. When the *Log On to Windows* screen displays, enter the following:
    - User Name: **Administrator**
    - Password: **Idexx**
4. Click **OK** to continue logging in.

If you have a Dedicated Server running Windows* 2008 R2' section

1. Turn on your server and monitor.
2. When the *CTRL* + *ALT* + *DELETE* displays press **Ctrl** + **Alt** + **Delete**.
3. Enter this information:
    - User Name: **Staff**
    - Password: **No Password**
4. Click the **right arrow**  button to continue logging in.

On the Workstations:

There are three types of workstations. Below you will find the directions for logging onto each type of workstation using Windows* 7. Follow the directions for the types of workstations you have in your practice.

Starting a Workstation on a Domain Network

1. Turn on your workstation, monitor and printers.
2. When the *Welcome to Windows* screen displays press **Ctrl** + **Alt** + **Delete**.
3. When the *Log On to Windows* screen displays, enter the following:
    - User name: **Workstation#** (ex. Workstation4) - *This should already be displayed.*
    - Password: **Idexx123**
4. Click the **right arrow**  button or press **Enter**  to continue logging in.

Starting a Workstation on a Peer to Peer Network

1. Turn on your workstation, monitor and printers.
2. Enter this information:
    - User name: **Staff** *(This should already be displayed.*
    - Password: **Idexx123**
3. Click **OK** or press **Enter**  to continue logging in.

Starting a Thin-Client Workstation (Terminal)

1. Turn on your workstations, monitors and printers.
2. If the session doesn't start automatically, double-click on the icon named **Server** which is located on your Desktop.
3. Enter this information:
   - User name: **Workstation#** (ex. Workstation4) - *This should already be displayed.*
   - Password: **Idexx123**
4. Click **OK** or press **Enter** to continue logging in.

Starting and logging on to Cornerstone

Once you have started your server and workstations the desktop with all of the icons will appear.

<u>To open the Cornerstone program</u>:

1. From your Desktop, double-click the Cornerstone shortcut.

<u>To log on to Cornerstone</u>:

The *Cornerstone Login* window displays.

2. Following the setup of staff members, passwords and security settings select your user name from the *User* list and press **Tab**.
   - You will not need to select your user name from the list if the password logon default setting is enabled. You will be able to logon using only your password.

   Username: ___________________________________

3. Type your password.
   - For security protection, asterisks or dots appear, not the password.

4. Click **OK** to complete the login process.

Shut Down Procedures

Remember to shutdown all workstations <u>before</u> shutting down the server.

Shutting Down the Windows* 7 Workstations

<u>Before You Begin</u>:

1. Log off and exit out of Cornerstone.
2. Close any other applications that are open.

<u>To shut down the computer</u>:

3. Click the **Start** button on the taskbar and then click **Shut Down**.
4. Select **Shut down** from the list and click **OK** to shut down the computer.

Shutting Down Thin-Client Workstations (Terminals)

Before You Begin:

1. Log off and exit out of Cornerstone.
2. Close any other applications that are open.

To shut down the computer:

3. Click the Start button on the taskbar and then click Log Off. When the server window closes continue to step 4.
4. In the drop-down list, select Shut down and click OK to shut down the computer.

Shutting Down the Server - Windows* 7 & Server 2008 R2

Before You Begin:

1. Log off and exit out of Cornerstone.
2. Close any other applications that are open.
3. Ensure that Cornerstone is closed on all workstations.
4. Verify that your daily backup procedures are being followed.

To close the Cornerstone database:

5. Double-click the **Stop Database and IDEXX Services** icon.
6. Click **Yes** at the *Do you wish to continue?* prompt.
7. When the *Success* message appears, click **OK** to exit.

To shut down the computer:

8. Click Start then Log off then click then Shut down .
9. If prompted, **Shut down** from the list and click **OK** to shut down the computer.

Starting the Cornerstone Database

Generally, Cornerstone's database will automatically start (open) when the server is started. Depending on the type of system setup you have, there are different ways to manually start the Cornerstone database on your server. The database can be opened or closed only from the server. The database is the only thing required to be running on the server; Cornerstone does not need to be running.

You will know the database has started when you see the SQL icon in the notification area on your taskbar.

You will see this database icon if you have a Peer-to-Peer, Dedicated or Terminal Server.

You will see this database icon if you have a Stand-alone Computer.

Manually Starting the Database

If the database does not start automatically, you can manually start the database by following this path:

- Select **Start** > **Programs** > **Cornerstone** > **Cornerstone Database Server**.

- A Terminal Services server may require the database to be started manually.

Function and Shortcut Keys

Using function and shortcut keys introduces you to keyboard shortcuts, which provides efficiency in navigating Cornerstone and accessing information.

Key	Description
F1	Help
F2	Look up (or double-click); functions within ID fields in areas such as *Patient Clipboard, Client List, Patient List, Invoice Item List, Prescription Instructions, Departing Instructions,* etc.
F3	*Census List* (shows patients currently checked into the practice)
F6	Allows data entry when adding medical notes in a classic Medical Note.
F7*	Moves back through client/patient names; functions within the *Client* or *Patient List*
F8*	Moves forward through client/patient names; functions within the *Client* or *Patient List*
Ctrl + N	Creates a new item (ex: estimate or invoice)
Ctrl + D	Deletes a highlighted record
Ctrl + U	Updates a highlighted record
Ctrl + L	Logs you off of Cornerstone
Ctrl + M or Ctrl + Enter	Allows you to insert a new line; functions in, prescription instructions, notes in prompts/ notes and/or signatures
Tab	Moves the cursor to the next field
Shift + Tab	Moves the cursor to the previous field
Enter Key	Commits or accepts certain actions throughout the software. (Caution: Do not use until knowledge of its function within a field is known)

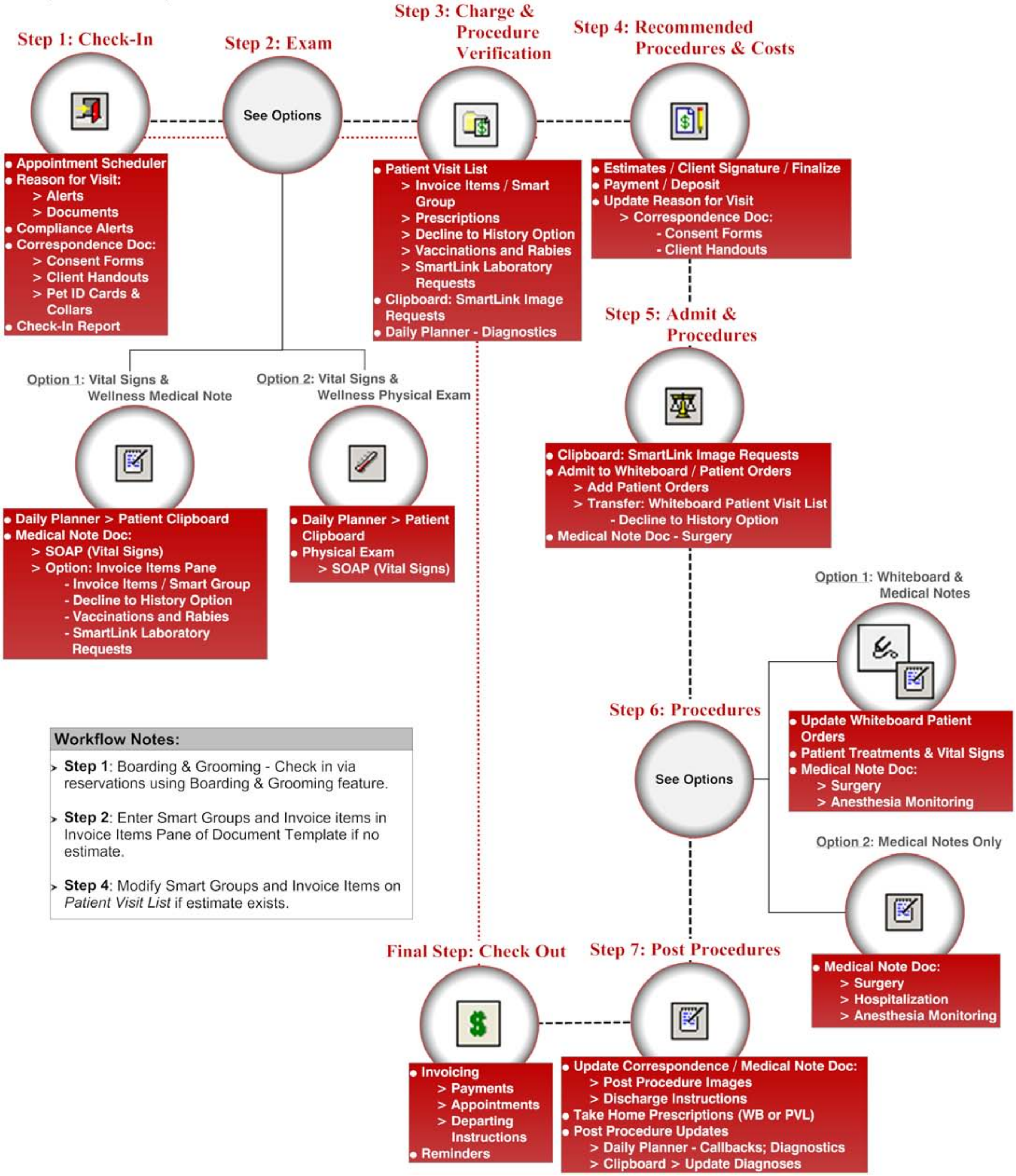
** F7 and F8 are specific to individual computers*

Patient Visit Workflow

This Cornerstone* workflow illustration demonstrates key patient visit steps for two major patient visit types:

- ·············· Wellness & Outpatient
- -------- Surgery & Hospitalized

The steps represent the training chapters and the red text boxes represent the notable features used within the patient visit step.



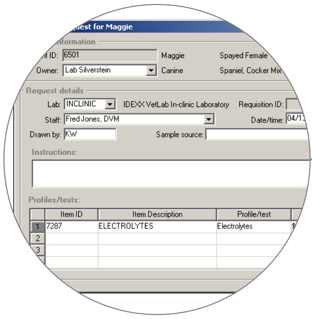
Workflow Notes:

- **Step 1**: Boarding & Grooming - Check in via reservations using Boarding & Grooming feature.
- **Step 2**: Enter Smart Groups and Invoice items in Invoice Items Pane of Document Template if no estimate.
- **Step 4**: Modify Smart Groups and Invoice Items on *Patient Visit List* if estimate exists.

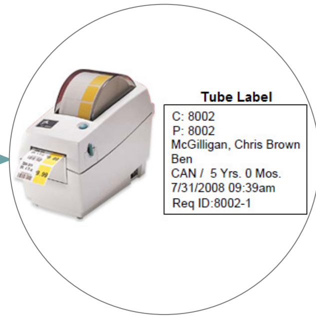
Laboratory Workflows

Direct Cornerstone windows & Equipment Touches: The medical team processing a lab request would experience the laboratory Cornerstone windows and equipment touches presented.

Step 1: Create New Lab Request & Print Label



Step 2: Create New Lab Request & Print Label



Step 3: Collect Your Sample

Step 4: Run the Test Using the IDEXX VetLab Station

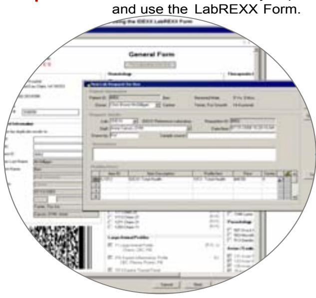
Step 5: Run the Test Using the IDEXX VetLab Station

Step 6: View Results in the Patient File and Manually Enter Lab Results

Note: Lab Requests and Results window Configuration
Condition - Activities > Labwork > Laboratories > Update

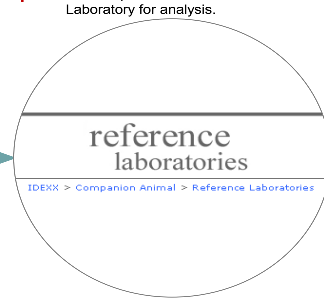
☑ Review results before posting

Steps 1 & 2: Create a new laboratory request and use the LabREXX Form.

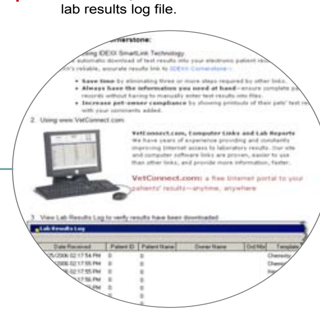


Steps 3 & 4: Print tube label and collect your sample.

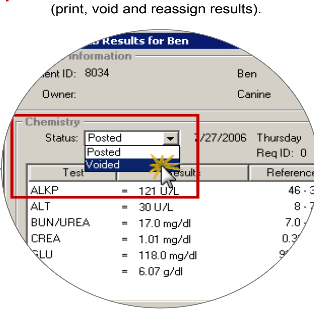
Step 5: Send sample to IDEXX Reference Laboratory for analysis.



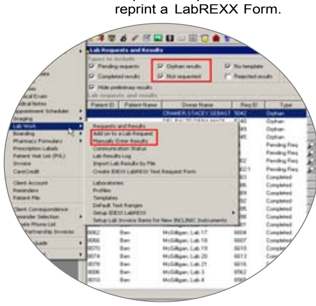
Step 6: Automatically download results and view lab results log file.



Step 7: View and post results in the patient file (print, void and reassign results).

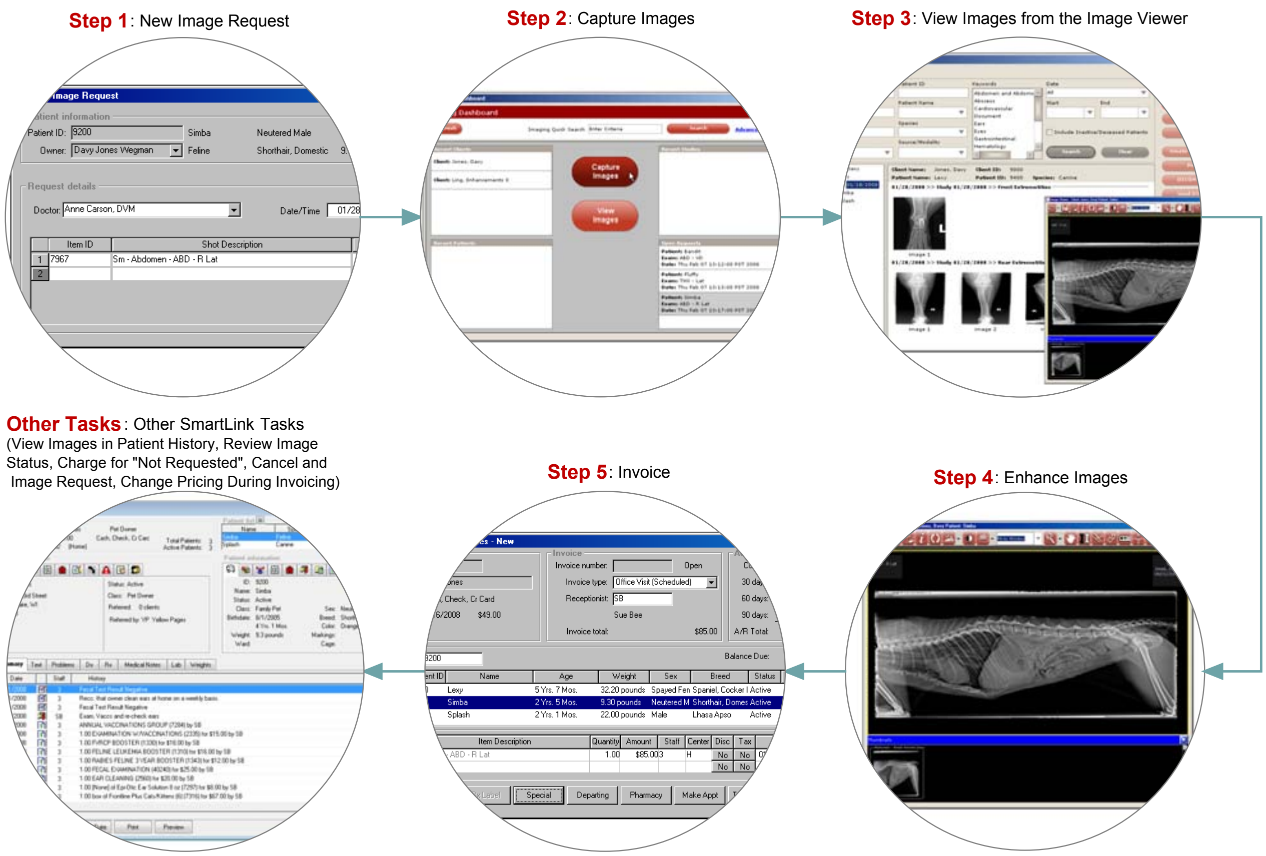


Other Tasks: Manually enter lab results, add onto a lab request, work with not requested/orphan results and reprint a LabREXX Form.



Imaging Workflow

Direct Cornerstone windows and Equipment Touches: The medical team processing an image request would experience the Cornerstone screens and equipment touches presented.



Medical Note Templates Per Visit Type

This compiled list is dynamic and represents templates available as samples from the Cornerstone Online Community and in Cornerstone.

Patient Visit Type	Cornerstone Medical Note Template
Wellness	New Puppy/Kitten Exam New Adopted Adult Pet HEAP (Hx, Exam, Assessment, Plan) Template Abbreviated Physical Exam Physical Exam (w/ Abnormals from Pat Advisor Exam)* Physical Exam (w/ all findings from Pat Advisor Exam)*
Outpatient (scheduled outpatient, drop-off, physical therapy, specialty appt)	Ear Exam PU/PD workup Seizures* Neurology* Dermatology*
Surgery	Sample - Abdominal Surgery Bladder Surgery Urolithiasis Bladder Surgery Bladder Surgery/Cystotomy Report Forelimb Amputation Abdominal Exploratory* Anesthesia Monitoring* Sample - Dental Exam/Cleaning - Canine Sample - Dental Exam/Cleaning - Feline Sample - Ovariohysterectomy - Routine Post-Operative Care for Routine Castration of Horses
Problem-Based Visits	Chronic Ear Exam Chronic Weight Loss Polyuria/Polydypsia Workup Vomiting Diarrhea Template
Hospitalized Medical Case	Anemia Workup* PU/PD workup
Emergency	Trauma Examination
Euthanasia	AVMA Model Euthanasia Authorization
Species Specific	Equine Colic Exam Equine Lameness Exam

*Cornerstone Online Community

Correct Invoices or Return Items

If you discover you have invoiced the wrong patient or client, you will want to correct this mistake.

What type of correction should I make?

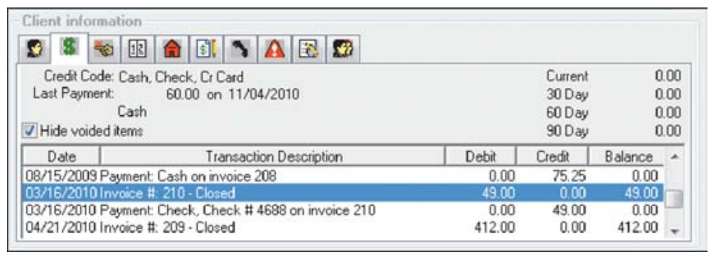
Negative invoices are regular invoices with negative invoice item quantities. Create negative invoices to give a refund for services and inventory. Negative invoices should be used to correct one or two problems on invoices where the other charges are correct.

Voided invoices reverse the entire invoice from the client's account and patient history. While the invoice remains in the account/history, it will display as 'voided' and you will have options to hide voided entries. Voided invoices should be used only when an entire invoice has been incorrectly billed, for example, the wrong patient or client was billed. This option is not available for CASH clients. (Only designated staff should void invoices.)

Creating a negative invoice for refunds

Open the incorrect invoice so you know exactly what was sold

1. To view the invoice, open the *Patient Clipboard* and select the client. Select the *Client Account* tab.
2. Right-click the incorrect invoice and select **View**. The invoice will open.



3. Click the **Print** button to print a copy of the invoice.

Start a new invoice for this client

4. From the *Patient Clipboard*, enter the *Client ID*. Right-click on the patient's name and select **Invoice**.
5. Enter the items that were incorrectly sold. Make sure that the quantity and price are the exact opposite (negative). Be sure to enter the same staff member in the *Staff ID* field and return any inventory items to exact location, lot number and expiration date.

6. Continue processing the invoice as usual.

Make a note about this error in the patient's history

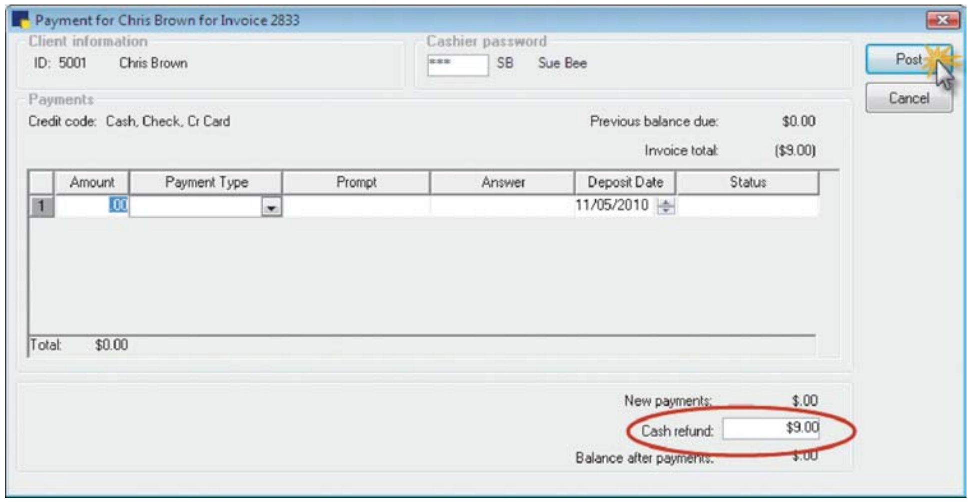
7. Click the **Medical Notes** toolbar button.

7.1 The patient's ID is entered by default. Press **Tab** to move to the *Staff ID* field. Enter your staff ID. From the *Template* area, select **Sample - Blank** and click **OK.**

7.2 If prompted enter a weight then enter your note, for example, **incorrectly billed annual canine group**, select the **Final** status and click **OK** to save it.

Reversing the payment

8. In the *Post Invoice* window, click **OK** to process a cash refund. Or, deselect the **Apply payments** check box to apply a credit to the client's account. Click OK to proceed.
9. If your practice has chosen to use this feature, enter your *Cashier password* and press **Tab**.
10. If your system is set to calculate change automatically, the refund amount will appear in the *Cash refund* field. If it is not set to calculate the change amount, **Tab** to the *Cash refund* field and enter the refund amount (as a positive amount).
11. Click **Post**.



Manually Correct Reminder Information (If Applicable)

12. If vaccines were sold on the incorrect invoice, manually correct the patient's reminder information.

12.1 From the *Patient Clipboard*, with the client and patient information entered, right-click on the patient and click **Update**.

12.2 Select the *Letter Reminders* tab.

12.3 Make any applicable changes.

Invoice the correct client and patient

13. If applicable, invoice the correct client and/or patient.

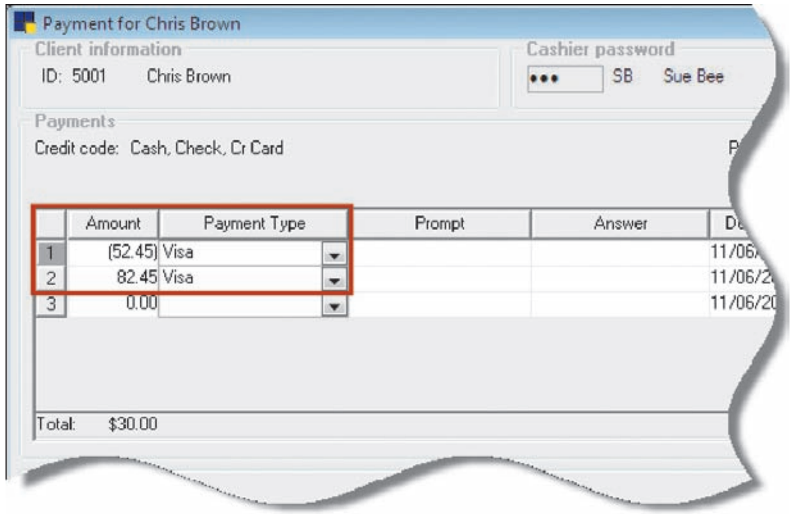
Remember! Your total number of invoices for the day will be inaccurate because of the corrections. Take this into account when you are reviewing your *Daily Summary Reports* and/or *Statistics by Staff Report*.

Correct Payments

If you are not sure how to correctly change a client's account, please call Cornerstone Support for assistance at 1-800-695-2877.

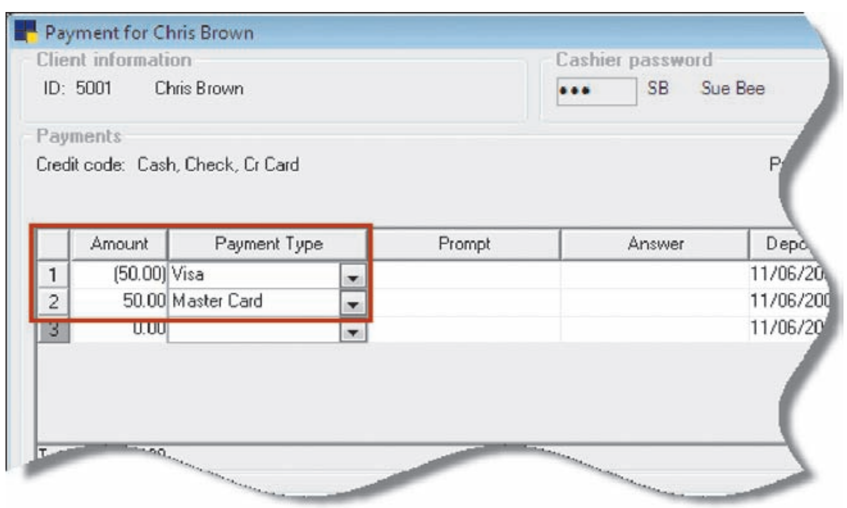
Correcting Payment Amounts

1. With the client's account displayed in the *Patient Clipboard**, select the *Account Information* tab.
2. Right-click in the white area and select **Payment**.
3. Type a Cashier password, if applicable, and press **Tab**.
4. In the payment *Amount* field, enter the amount that is being corrected as a negative amount.
5. Select the same **Payment Type** as originally entered.
6. In the next *Amount* line, enter the correct amount in the payment *Amount* field and select the **Payment Type**.
7. **Tab** to the *Change given* field to verify the *Balance after payments*.
8. Click **Post**.
9. Click **Yes** or **No** to print.



Correcting Payment Types

1. With the client's account displayed in the *Patient Clipboard**, select the *Account Information* tab.
2. Right-click in the white area and select **Payment**.
3. Type a *Cashier password*, if applicable, and press **Tab**.
4. In the payment *Amount* field, enter the amount that is being corrected as a negative amount (e.g., -$50.00).
5. Select the **Payment Type** as originally entered.
6. In the next *Amount* field, enter the same amount as was originally entered. Select the correct **Payment Type**.
7. **Tab** to the *Change given* field to verify the Balance after payments.
8. Click **Post**.
9. Click **Yes** or **No** to print.



Correcting Change given mistakes:

Example 1: John Doe's invoice totals $40. He gives you a $50 bill and tells you to apply the extra $10 as a credit. You forget to enter zero in the change given field. What now?

To correct this type of mistake create a new payment

1. With the client's account displayed in the *Patient Clipboard**, select the *Account Information* tab.
2. Right-click in the white area and select **Payment**.
3. Type a *Cashier password*, if applicable, and press **Tab**.
4. In the *Change given* field, enter a negative amount, for example, **-$10**
5. Click **Post** to post the payment.

Example 2: John Doe's invoice totals $40. He gives you a $50 bill. You forgot to enter $10 in the change given field. What now?

To correct this type of mistake, create a new payment

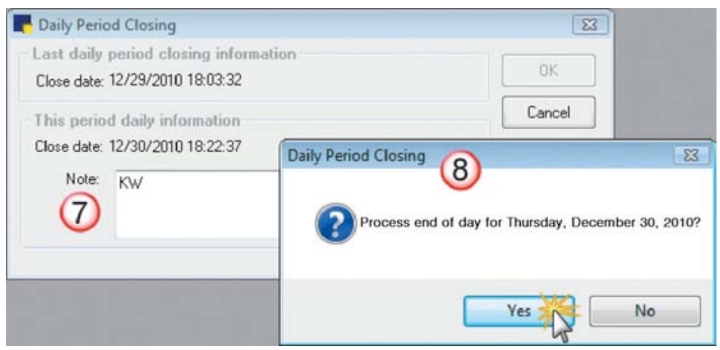
1. With the client's account displayed in the *Patient Clipboard**, select the *Account Information* tab.
2. Right-click in the white area and select **Payment**.
3. Type a *Cashier password*, if applicable, and press **Tab**.
4. In the *Change given* field, enter the correct amount of change given, for example, **$10**.
5. Click **Post** to post the payment.

Process End of Day

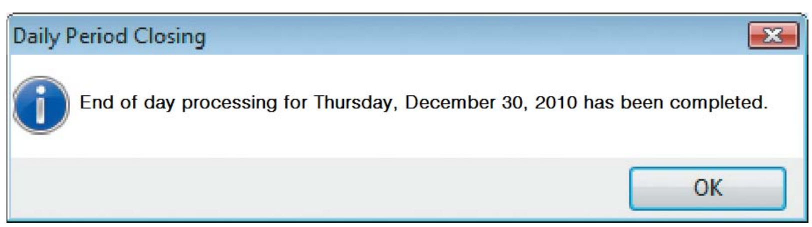
Important! It is imperative for your practice to have a good backup procedure in place. Backups provide security against the unlikely event that files are lost or destroyed. As an added safety precaution, you should remove the most recent backup from the practice and/or place it in a DATA-Rated fireproof safe.

Depending on the backup procedure at your practice, you can do a manual backup before completing end of day processing or create one automatically as setup by IDEXX Computer Systems. Contact the System Administrator at your practice, or Cornerstone Support at 1-800-695-2877, if you have questions about your backup procedure or how to verify that your backup was successful. Do not take chances with your practice data.

1. From the **Menu** bar, select **Reports** > **End of Period** > **End of Day**.
2. Select **Current** and **Preview** or **Print** the *Daily Deposit Report* to balance your cash drawer. Make any corrections before proceeding.
3. Optional: Run your backup. A backup can be performed at this point, after End of Day is processed or completed automatically as setup by IDEXX Computer Systems. Please check with your practice administrator for your practice's procedure.
4. From the **Menu** bar, Select **Activities** > **End of Period**.
5. Select **End of Day**.
6. The following message displays: *A daily backup should be made prior to processing* **end of day**. Click **OK**.



7. Optional: In the *Note* field, type in your initials and click **OK**.
8. The following message displays: *Process end of day for _____?* Click **Yes**.
9. A *Daily Period Closing* window displays automatically. This window has two areas that show the *Status* and *Statistics* of the End of Day Closing. When End of day has finished processing this window will automatically close.
10. When End of Day has finished processing, click **OK** on the *Daily Period Closing* window.
11. Print your daily reports. Follow your practice's protocols for printing reports.



IDEXX Cornerstone

IDEXX Backup Instructions

Document Purpose	This document is presented to IDEXX Cornerstone customers to outline IDEXX's recommended backup practices including redundancy and retention. This document also includes information on the three IDEXX currently supported backup software programs and how to use them when configured by IDEXX. **Note**: The backup selections section will help with configuring a backup that wasn't configured by IDEXX. For assistance with any previously supported backup software or configuring a backup software not mentioned, please contact IDEXX Support at 1-800-695-2877.
Responsible Data Maintenance	Creating and implementing a data backup and recovery plan is one of the most important duties at a practice. Important reasons to have data backup include: accidental deletion of data, corrupt data, natural disaster, and theft. **Note:** Proper backup, verification, rotation, labeling, and storage of the data backup media are the responsibility of the practice.
Backup Media Redundancy & Retention	**CD/DVD backups:** • IDEXX recommends that a practice should use a new disc every day. IDEXX does not recommend the use of CD-RW, DVD+RW or DVD-RW media due to possible data corruption or accidental overwriting of the data. • IDEXX recommends that a practice keep the most recent 30* days of daily backups. End of month backups should be kept for 2 months and yearly backups should be kept for 3-7** years. **Tape & RD1000 backups:** • Minimum: Five total tapes or cartridges (Two rotating daily, two rotating monthly, and one yearly**) • Recommended: Ten total tapes or cartridges (Seven rotating daily, two rotating monthly, and one yearly**) **Online Backups:** • IDEXX recommends to run a local backup to CD/DVD, tape, or RD1000 cartridge for monthly and yearly** backups. * IDEXX recommends retaining 30 daily backups due to the possibility of disc damage and ease of storage. ** Please confirm your data retention requirements with your particular state or province to determine the amount of yearly backups to retain.
Media Storage	For greatest assurance of the safety of your data backup media IDEXX recommends storage of backup media either offsite or onsite in a data-rated fireproof safe.

Unattended End Of Day Database Copy	The Unattended End Of Day Database Copy (first available in Cornerstone version 5.0) can create a backup copy of the database while you work or overnight. This is in addition to your full daily data backup that is on a CD/DVD, tape, RD1000 cartridge, or online (IDEXX VetVault). This creates an extra copy of your database for added data security. IDEXX strongly recommends that every practice takes advantage of this feature. Call IDEXX Cornerstone Support at 1-800-695-2877 to ensure this feature is activated and working properly.
IDEXX Currently Supported Backup Software	CD/DVD & RD1000 Backups: Softland Backup4all* Tape & RD1000 Backups: Symantec* Backup Exec* Online Backups: IDEXX VetVault* Backup Solution
Automatic Backups	Backup4all, Backup Exec, and IDEXX VetVault backups are scheduled to run nightly (depending on days open). The Cornerstone Database must be open to run the backup unless the backup is on a Stand-alone computer. For a backup that is not configured by IDEXX please see the Backup Selections section below for more details or please call IDEXX Hardware Support at 1-800-695-2877.

Backup Selections

By default IDEXX sets the backup software we support to back up the files and folders listed under the Required Cornerstone Data and Other Data sections. For additional information or for help configuring your backup on a server not purchased through IDEXX please reference the sections below and call IDEXX Support at 1-800-695-2877 for additional help.

Note: In this section all files and folder paths are written without a drive letter. On your computer for example, the path may be C:\Cstone\DailyCC or C:\Idexx.

Required Cornerstone Data

- Cstone\DailyCC
- Cstone\Images
- Cstone\SamQuery (may not be present)
- Cstone\Share (excluding the Cstone\Share\Install folder)
- Cstone\Spell
- Idexx (VetVault users: A-Idexx)

Note: Stand-alone computers will backup the Cstone\cstone.db and Cstone\cstone.log files instead of the Idexx folder, with Cornerstone and the database closed.

Note: To set up an automatic backup on a server not purchased through IDEXX a pre-job needs to be setup that runs Cstone\csdbback.bat while the database is open to copy the database and log into the Idexx folder for the backup to run correctly.

Other Data

- Desktop
- Favorites
- My Documents

Manual Backup Instructions for Backups Jobs Created by IDEXX	**Backup4all** 1. Place the CD/DVD or cartridge into the appropriate drive. 2. Double-click the **Manual Backup** icon on desktop. 3. If using a CD or DVD, the CD/DVD will eject when it has completed. **Backup Exec** 1. Place the tape or cartridge into the appropriate drive. 2. Double-click the **Symantec Backup Exec** icon on the desktop or in the Start Menu. 3. Click the **Job Monitor** tab. 4. Right-click **Daily Backup** in the Current Jobs section and click **Run Now**. 5. Click **Yes** at the *Do You Want to Continue?* prompt. 6. Once the backup completes, the Job History section will show a Job Status of Successful with the current date and time and the tape will eject. 7. Close Backup Exec. **IDEXX VetVault Backup Solution** 1. Contact IDEXX Hardware Support at 1-800-695-2877 for assistance with a manual backup.

For further assistance, please call IDEXX Hardware Support at 1-800-695-2877 and reference KB2292.

IDEXX LABORATORIES

www.idexxcornerstone.com

IDEXX Cornerstone

IDEXX Cornerstone Backup Verification Assistant

Document Purpose

This document is presented to IDEXX Cornerstone customers to describe the setup and use of the Cornerstone Backup Verification Assistant.

Overview

The Cornerstone Backup Verification Assistant provides an extra precautionary measure to protect your data by scanning the backup log and reporting possible problems when a staff member logs into Cornerstone.

If your practice uses compatible backup software, you can set up Cornerstone to automatically verify your backup. The following backup software is compatible: Backup4all*, Backup Exec*, BackUp MyPC*, PC Backup, TapeWare*, and IDEXX VetVault* Backup Solution.

How the Backup Verification Assistant works

The Backup Verification Assistant scans your backup log for certain keywords. If keywords are found, the Backup Verification Assistant highlights the line(s) in your backup log and displays them, color-coded, in the Summary area.

Backup Exec, TapeWare and BackUp MyPC

- Red – indicates there was a warning or error during the backup process.
- Blue – indicates a Cornerstone data file with a file date older than the backup date. It is normal for the cstone.db file to display in blue if an automatic backup is scheduled to run nightly.
- Green – indicates a Cornerstone data file with the current file date was backed up.

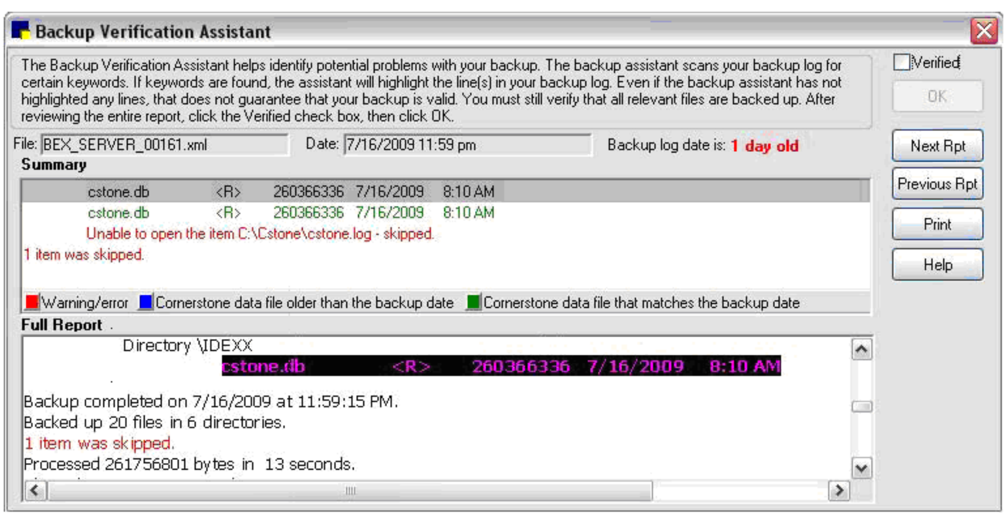
Backup4all and PC Backup

- Red – indicates there was a warning or error during the backup process.
- Green – indicates a Cornerstone data file was backed up.

IDEXX VetVault Backup Solution

- Red – indicates there was a warning or error during the backup process.
- Blue – indicates a Cornerstone data file was NOT backed up.
- Green – indicates a Cornerstone data file was backed up.

Example



Enabling the Backup Verification Assistant	1. On the **Tools** menu, select **Backup Verification Assistant**. 2. Select the backup software that is used by your practice. 3. Select the **Use Backup Verification Assistant** check box. 4. Click **OK**.
Viewing the Backup Verification Assistant	Cornerstone Administrators and staff with proper security permissions will see the Backup Verification Assistant the first time they log in each day. It can also be viewed manually through the Reports menu. **To manually view the Backup Verification Assistant:** 1. On the **Reports** menu, select **Backup Logs**. 2. After viewing the Backup Verification Assistant, select the **Verified** check box. 3. Click **OK**.

For further assistance, please call IDEXX Cornerstone Support at 1-800-695-2877 and reference KB3933.

IDEXX LABORATORIES

Cornerstone 8.1 Basic Foundation

Training Evaluation

Cornerstone 8.1 Basic Foundation Training Evaluation

We value your opinion and your feedback is vital to our continuous improvement. Please provide your anonymous feedback by using the online evaluation found at www.idexx.com/cs81 or completing the evaluation below.

Practice: ______________________ Date: ______________

Trainer(s): ______________________

Please tell us how each of the following met your expectations.	**Did not meet expectations**								**Met Expectations**	
1. The Training Guide content was in a logical order. Comments:	1	2	3	4	5	6	7	8	9	10
2. The Training Guide content and format made it easy for me to learn. Comments:	1	2	3	4	5	6	7	8	9	10
3. My trainer used the guide throughout the day. Comments:	1	2	3	4	5	6	7	8	9	10
4 My trainer was well prepared and organized. Comments:	1	2	3	4	5	6	7	8	9	10
5. My trainer provided positive reinforcement. Comments:	1	2	3	4	5	6	7	8	9	10
6. My trainer was effective in checking my understanding of the material. Comments:	1	2	3	4	5	6	7	8	9	10

Please tell us how each of the following met your expectations.	**Did not meet expectations**								**Met Expectations**	
7. My trainer responded to my questions appropriately. Comments:	1	2	3	4	5	6	7	8	9	10
8. My trainer adapted to my learning needs. Comments:	1	2	3	4	5	6	7	8	9	10
Additional comments not addressed above:										

Thank you! We appreciate your feedback.

Testimonial Permission:

Contact information is strictly voluntary.

(Please check the box below)

☐ Please have an IDEXX Computer Systems Representative contact me to discuss featuring my comments in promotional materials.

Please Print:

Your Name: ______________________________

Practice Name: ______________________________

Practice City, State: ______________________________

Practice Telephone #: ______________________________

You can also return this Training Evaluation using one of the following methods:

Fax this information to:
Field Installation and Training Department
at 715-855-7482.

Mail this information to:
IDEXX Computer Systems
Attn: Education Department
2536 Alpine Road
Eau Claire, WI 54703

This program was reviewed and approved by the AAVSB RACE program for continuing education. Please contact the AAVSB RACE program at race@aavsb.org should you have any comments/concerns regarding this program's validity or relevancy to the veterinary profession.

IDEXX LABORATORIES

Support: 800-695-2877 • Sales: 800-283-8386

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